NATIONAL ESTUARINE RESEARCH RESERVE SYSTEM

National Estuarine Research Reserve System

COASTAL TRAINING PROGRAM
PERFORMANCE MONITORING MANUAL
2.0

NOAA NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION U.S. DEPARTMENT OF COMMERCE

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NATIONAL ESTUARINE RESEARCH RESERVE SYSTEM

The National Estuarine Research Reserve System is a network of protected areas established for long-term research, education and stewardship. This partnership program between NOAA and the coastal states protects more than 1.3 million acres of estuarine land and water, which provides essential habitat for wildlife; offers educational opportunities for students, teachers and the public; and serves as living laboratories for scientists.

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National Estuarine Research Reserve System

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I. OVERVIEW

CTP Coordinators, NCTC 2010 (photo credit: NOAA / NERRS photo library)

The National Estuarine Research Reserve System's (NERRS) Coastal Training Program (CTP) is a national training program providing up-to-date scientific information and skill-building opportunities to individuals who are responsible for making decisions that affect coastal resources. Acting as a bridge between the science, policy and management communities, CTP uses an integrated approach to connect decision makers with the information they need and to ensure that they can address critical resource management issues of concern to local communities (NOAA 2011a)

Why monitor Coastal Training Program performance?

As the CTP continues to develop and mature, it is increasingly important to track progress at a system-wide level, in order to:

- Assess effectiveness in meeting the goals and objectives of the CTP;
- Provide quantitative and qualitative data for program evaluation;
- Increase accountability to constituents, stakeholders, and NOAA;
- Identify and establish significant trends in audiences and issues that could influence NERRS policy and strategic planning and other organizations and programs that target coastal decision-makers;
- Attract partners interested in working with a successful program;
- Document achievements for use in fund-raising efforts (NOAA 2011b).

Since early 2000, a number of groups have worked hard to develop a solid program foundation and framework for measuring performance of the CTP, including: NERRS CTP and Education Coordinators, the CTP Oversight Committee and a CTP Performance Monitoring Workgroup. An external review of the CTP was initiated in 2008, which provided the Program with recommendations for improvement. The panel made two recommendations explicitly tied to

NERRS Poster Session, NCTC (photo credit: NOAA / NERRS photo library)

performance monitoring: 1) streamline the process and training evaluation form, and 2) focus on gathering more qualitative information to help tell the "CTP story" to NERRS and NOAA leaders.

A recently revised logic model has helped focus the CTP's continued development by identifying performance indicators that efficiently track progress. The logic model is a depiction of what the CTP is designed to accomplish and how the program is expected to work. It describes the goals, outcomes, resources, activities, and outputs that are inherent to a functional CTP. The logic model serves as both a planning tool and an effectiveness monitoring tool (See Appendix 1 for more detail).

The CTP Coordinators (CTPCs) have designed a performance monitoring system rooted in the CTP logic model and grounded in performance indicators. This performance monitoring system addresses a specific objective included with goal three of the 2011-2016 NERRS Strategic Plan:

"Improve the capacity and skills of coastal decision makers to use and apply science-based information in decisions that affect estuaries and coastal watersheds (NOAA 2011c)."

Performance monitoring enables assessment of site and system-wide CTP progress towards achieving national and reserve-level performance standards and helps to identify program development needs.

The combination of quantitative and qualitative data allows evaluation of the CTP's utility, effectiveness, and efficiency.

CTP performance indicators are linked to strategic planning metrics for the NERRS as well as the oversight agency, NOAA. NOAA expects that all programs support the Administration's planning goals and objectives in what is termed "evidence of progress."

The CTP objective of creating "resilient coastal communities that can adapt to the impacts of hazards and climate change" helps to monitor CTP progress in achieving the NOAA Strategic Plan goal of creating Resilient Coastal Communities and Economies (i.e., the Coastal Goal). Specifically, NOAA is able to refer to the CTP performance monitoring system for evidence of progress towards providing: "Appropriate science-based tools and information for assessing hazard risk, vulnerability, and resilience that coastal decision makers and community leaders can understand and use (NOAA 2010)."

In addition, CTP performance indicators can provide evidence of progress with other NOAA strategic plan objectives, including:

- Policy makers have the information and understanding they need to implement and manage options that mitigate climate change;
- Consumers of climate information understand the strengths and limitations of climate information and utilize this knowledge in their decision-making process;
- Communicate scientific information and its associated uncertainties accurately and effectively to policy makers, the media, and the public at large;
- Increased understanding and use of climate, weather, ocean, Great Lakes, and coastal environmental

information to promote stewardship and increase informed decision making by stakeholders, educators, students, and the public who are interested in science, and;

- NOAA effectively engages key stakeholders and the public to enhance literacy of climate, weather, ocean, and coastal environments.

The CTP performance monitoring protocol also informs progress towards the NERRS Strategic Plan education objective to "Improve the capacity and skills of coastal decision makers to use and apply science-based information in decisions
that affect estuaries and watersheds of the bio- region." Again, this NERRS objective relates to the "evidence of progress" requirement found in the NOAA Strategic Plan (NOAA 2010).

What is included in this manual?

This manual provides an overview of the framework that CTP staff use to collect, evaluate, and report on specific attributes of program performance. It builds upon a prior performance monitoring manual, published in 2006; this version reflects changes within the Program in response
to recommendations from the external review of the CTP conducted in 2008 and more recent updates made to performance monitoring. The manual includes specific information on:

- Background and history of CTP performance measurement;
- Required and suggested training evaluation questions;
- Guidance on writing outcomes and success stories;
- CTP reporting requirements and schedule;
- Guidance on how to use the OCRM/CSC Performance Monitoring Database;
- CTP specific performance standards;
- Frequently Asked Questions, Acronyms and Definitions.

Coastal Growth Workshop (photo credit: Whitney Jenkins)

II. BACKGROUND AND HISTORY OF CTP PERFORMANCE MEASURES

In 2009, the CTP community assigned the CTP Performance Monitoring Workgroup to update the performance monitoring system in response to external review recommendations while maintaining consistency with a revised Program logic model (Appendix 1). The Workgroup's objective was the creation of a streamlined performance monitoring system to collect both qualitative and quantitative information that demonstrate the impact of CTP on decision-maker knowledge, skills, and behavior, as well as on environmental, social, and economic conditions.

Initially, CTP Coordinators drafted indicators for 30 separate logic model outcomes. The Workgroup narrowed priorities by clarifying users of data, developing evaluation questions relevant to each type of user, and by focusing on the strongest linkages between performance monitoring and the CTP logic model. Key users of evaluation data suggested evaluation questions as outlined in the table below.

Performance measures most commonly addressed four priority logic model elements, the utility of which were underscored by CTP Coordinators:

User	Relevant performance data
OCRM/CSC Director	"How effective is CTP at delivering timely science-based information to support informed decisions in communities near reserves?"
NOAA Administrator	"Is CTP improving coastal stewardship?"
OCRM/CSC Staff	"How effective/efficient is CTP at impacting decisions affecting coastal issues and reserves?"
NOAA Partners	"How well does CTP engage target audiences around topics of mutual importance?"
External Partners	"How does CTP serve the mission of my agency?"
CTP Coordinators	"How effective is my program at impacting decisions affecting coastal issues for my reserve?"
NERR Managers	"How much training has been delivered?" Also relevant: success stories, participant affiliation, collaboration

1. Decisions made and actions taken by coastal decision makers (CDMs) reduce negative pressures on coastal ecosystems and Reserve watersheds ("Long Term Outcome 2");
2. CDMs use science-based knowledge, skills and resources to support decisions and activities related to NERRS priority issues ("Mid Term Outcome 1");
3. CTP training or service is a valuable use of time for participating CDMs ("Short Term Outcome 1"), and;
4. CDMs increase science-based knowledge and skills related to NERRS priority issues ("Short Term Outcome 3").

The Performance Monitoring Workgroup also identified four additional monitoring priorities from the logic model:

5. Intent to apply knowledge or skills ("M1 Bridge");
6. Training programs, presentations, and services ("Output 1");

(photo credit: Avia Huisman)

7. Identify gaps in and barriers to communication, collaboration, or knowledge at individual and programmatic scales ("Activity 1"), and;
8. Funding ("Resources 1").

Performance indicators were subsequently developed for seven of the logic model elements (1-7, above); funding is tracked as a potential covariate.

III. TRAINING EVENTS AND TECHNICAL ASSISTANCE

The CTP provides both training events and technical assistance to coastal decision makers. Both contribute to the outcomes and goals of the CTP.

The CTP Mentoring Workgroup developed guidelines and descriptions of training and technical assistance.

A. TRAINING EVENTS

Training events are provided to CDMs in order to support and contribute to the outcome(s) and goal of the Coastal Training Program.

Questions to ask to determine if an event is considered training:

- Is this an event targeted and tailored to a group of CDMs?
- Does the event contribute to an outcome identified in the CTP logic model? If so, how?

If the answer is YES to all of the above, then the event can be classified as training.

Examples of trainings:

- Workshops
- Seminars
- Field experiences
- Demonstrations
- Conferences
- Distance-learning opportunities

B. TECHNICAL ASSISTANCE

Technical assistance is service provided to CDMs that supports and contributes to the outcome(s) and goal of the CTP.

Questions to ask to determine if an activity is considered technical assistance:

- Is a CDM audience being served (i.e., do the individuals involved regularly make decisions about coastal resources)?
- Does the service contribute to an outcome identified in the CTP logic model? If so, how?
- Is this a substantive one time or repeated service/event that cannot be classified as training? (Please refer to the examples provided below.)
- Was the assistance provided or coordinated by CTP or CTP-related staff?

If the answer is YES to all of the above, then the activity can be classified as technical assistance.

Examples of technical assistance:

- Facilitating meetings (must relate to CTP priority issues)
- Providing survey and evaluation assistance (must relate to CTP priority issues)
- Assisting partners with grant writing
- Assisting state agencies with plan revisions (e.g., a state resource classification guide, stormwater manual, etc.)
- Assisting groups with implementation of best management practices (e.g., helping natural resource managers to design and organize a stormwater webinar related to BMPs for state parks, assisting resource manager with a needs assessment survey, etc.)
- Developing GIS products (e.g., map of town's environmental resources, map of local land acquisition priorities, etc.)
- Assisting organizations with strategic/action planning
- Creating publications or websites for use by CDMs
- Assisting municipalities with writing comprehensive plans, ordinances, etc.

(photo credit: Rosalyn Kilcollins)

- Serving in an advisory or leadership role on a committee/watershed group (with regular, active, contributions, i.e., these meetings are influenced by CTP participation)

Technical assistance is NOT:

- General program administration or maintenance (updating calendars, purchasing supplies, handing out/ providing web access to publications, etc.)
- Attendance and/or participation at committees/watershed meetings where CTP's main objective is to "keep your finger on the pulse" of the community
- Dissemination of publications/ websites
- Lectures to non-decision maker audiences where the outcome is audience awareness, not specifically designed for outcomes identified in the CTP logic model (e.g., presentation on the importance of reserve lands)

This work was vetted and then approved through the standing CTP governance process in January 2011. It is important to understand the definition of these services as applied in the CTP and how they can be tracked and their outcomes reported.

IV. REPORTING

Mission-Aransas HQ Dedication (photo credit: Matthew Chasse)

A. INTRODUCTION

The performance monitoring system has three components:

1) Performance indicators
2) Outcome statements
3) Success stories

A brief summary of these components is given below and is followed by a more detailed explanation.

What do I need to report?

I. Performance Indicators – These include post-event tracking requirements and surveys.

a. Tracking

i. Number of Events

ii. Number of Contact Hours

iii. Funding (see Appendix 15)

b. Post-Event Evaluation

i. CTP training or service is a valuable use of time for participating CDMs

ii. CDMs increase science-based knowledge and skills related to NERRS priority issues

iii. Intent to apply knowledge or skills

II. Outcome Statements - A few (4-7) sentences describing specific results from a training event, technical assistance, or other CTP activity.

III. Success Stories - More comprehensive narratives are appropriate when a CTP Coordinator has something more significant to report with the evaluation data and/or evidence to support it. These are the events and/or accomplishments that best illustrate the highest potential of the CTP. Please note that success stories should only be written when there is truly a success and linked to mid to long-term outcomes. However, under the new performance standards model, described in Section VIII and in Appendix 13, CTPs will describe at least one success story annually in the performance monitoring database.

When and where do I report this information?

Performance data can be submitted to the online performance monitoring database at any time, but the above performance data is officially due at the same time as a Reserve's semi-annual operations grant progress report. See Appendix 11 for step-by-step instructions on how to use the database.

B. POST-EVENT TRACKING REQUIREMENTS

The following performance indicators are required by NOAA OCRM/CSC. CTP Coordinators are required to record the following indicators and to enter the data into the online performance monitoring database.

Mandatory performance indicators:

1. Number of events

   This number is automatically calculated by the Performance Monitoring Database with event submission.

2. Contact hours

   This is a quantitative measurement of the number of clock hours of instruction multiplied by the number of participants during a training event or the number of clock hours a CTP Coordinator provides technical assistance to CDMs.

3. Number of CDMs reached

   The total number of CDMs that participate in CTP events. Be sure to record the total number of participants per event.

4. Affiliation of CDMs reached

   Classifying each participant within a particular audience type is an important component of performance monitoring. CTP Coordinators are required to track the diversity of organizations represented at CTP events. Each Coordinator must classify participants into the following organizational categories:

   - Federal – Elected, appointed officials or staff from the U.S. Federal government;
   - State – Elected, appointed officials or staff from state government;
   - County – Elected, appointed officials or staff from county government;
   - Regional – Elected, appointed officials or staff from regional governmental groups or associations;
   - Tribal - Sovereign, domestic tribal nations;
   - Local – Elected, appointed officials or staff from local government;
   - Business – Business officials, association staff and private consultants;
   - University – University or college officials, researchers or staff;
   - Media – Print, radio, TV or freelance media representatives;
   - Community Members – unaffiliated members of a community, or;
   - NGO/Community – Not-for-profit or community-based organization members.

5. Event type
6. Event duration
7. Funding

A pilot to track overall workshop investment in dollars and source of the invested resources (315 funds, external funds, and in-kind resources) was conducted from FY 2011-13. There is no associated indicator; information was collected for tracking purposes only. See Appendix 15 for details.

Wastewater Workshop at Waquoit Bay NERR (photo credit: Tonna-Marie Surgeon-Rogers)

C. POST-EVENT SURVEYS

Post-event survey questions are a primary method of performance monitoring. The following REQUIRED "post-event survey questions" must be asked word-for-word as written below. There are three required post-event survey questions. These questions have been vetted and approved through the standing CTP governance process. Below are also listed OPTIONAL follow-up example questions that do not have to be written word-for-word; you can use, alter, or ignore these questions (see example in Appendix 9). CTP Coordinators may also develop and ask additional optional questions that serve their specific needs.

REMINDER: Required measures MUST be worded EXACTLY like the examples below. Optional questions can be changed at the Coordinator's discretion.

Required Survey Question #1 (of 4:

- Participating in this training event was a good use of my time:

  1-Strongly disagree

  2-Disgree
  3-Agree
  4-Strongly agree
  Prefer not to answer/not applicable

Example optional follow-up question:

- If you chose 1 or 2 on the above scale, please explain.

Link to CTP Logic Model –

Short Term Outcome 1: CTP training or service is a valuable use of time for participating CDMs

Indicator: Positive post-training survey response

Required Survey Question #2 (of 4):

- How much did this training event increase your knowledge of (NERRS priority issue)? OR
- How much did this training increase your skill or ability to use (technology, methodology, or BMP)?

  5-A great deal

  4-A lot
  3-Some
  2-A little
  1-Not at all
  Prefer not to answer/not applicable

Examples of optional follow-up questions:

- If you chose a 1 or 2 on the above scale, why did you make this choice?

  I already know a lot about this subject or have these skills.
  The training was too basic
  The training was too advanced
  The training was not effective
  Other (please specify)

- If you chose a 4 or 5 on the above scale, please give a short answer to the next question.
- In what way(s) did this training increase your knowledge of (NERRS priority issue)? OR
- In what way(s) did this training increase your skill or ability to use (technology, methodology, or BMP)?

Link to CTP Logic Model –

Short Term Outcome 3: CDMs increase science based-knowledge and skills related to NERRS priority issues

Indicator: Percent of training participants reporting increase in knowledge or skills

Required Survey Question #3 (of 4):

- I learned something that Iwill apply in my work now or in the future.

1-Strongly disagree

2-Disgree
3-Agree
4-Strongly agree
5-Prefer not to answer/not applicable

Examples of optional follow up for internal mid- and long-term outcome tracking purposes:

- If 3 or 4, where would we look in the future (e.g., one year) to see evidence of that application?
- If yes, can we contact you in 6 to 12 months to ask you how you used what you learned in your work?

o Yes

o No

Please provide contact information:_____.

- If 1 or 2, do you foresee specific obstacles with regard to applying this information?
- What additional training or assistance would help address these obstacles?

Required Survey Question #4 (of 4):
I would recommend this training event to professional colleagues

1-Strongly disagree

2-Disgree
3-Agree
4-Strongly agree
Prefer not to answer/not applicable

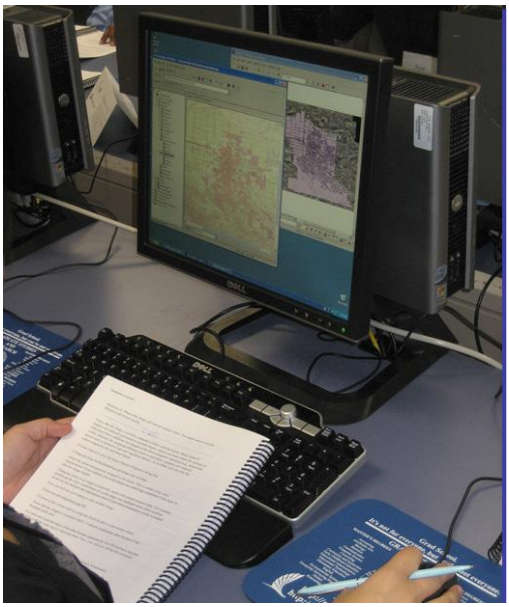
Link to CTP Logic Model –

M1 Bridge: Intent to apply knowledge or skills

D. OUTCOME STATEMENTS AND SUCCESS STORIES

Outcome Statements

An outcome statement is a short (4 -7 sentence) paragraph describing specific results, actions, impacts, and/or outcomes that resulted from a training event, technical assistance, or "other" type of CTP activity (see examples in Appendix 2):



GIS Workshop at Mission-Aransas NERR (photo credit: Chad Leister)

- Length: 75 word maximum
- Focus: Who benefited and how? What tools and technologies were implemented/used?
- Data: numeric or narrative data that show value or explain the outcome of training

Success Stories

Success Stories are more comprehensive narratives and are appropriate when a CTP Coordinator has something more significant to report with the evaluation data and/or evidence to support it. These are the events and/or accomplishments that best illustrate the highest potential of the CTP.

Why should we collect these?

The CTP Coordinators agreed to capture narrative data related to the following outcomes as noted in the logic model:

- CDMs use science-based knowledge, skills and resources to support decisions and activities related to NERRS priority issues;
- Decisions made and actions taken by CDMs reduce negative pressures on coastal ecosystems and NERRS watersheds. (Policy, ecological, or enforcement changes address priority ecosystem threats identified by reserve

management plans and regional ocean/ coastal governance institutions), and;

- Identify gaps in and barriers to communication, collaboration, or knowledge at individual and programmatic scales.

Why else?

- To show accountability for public funds;
- To verify that the CTP is using resources to make a difference in people lives and in the environment;
- To share successes so individuals in NERRS and beyond can learn from the results of CTP work;
- To spread the word about the value of NERRS CTP;
- To show that numbers alone don't tell the full story of CTP, and;
- To reflect and learn from the CTP experience.

What does a success story look like?

The success story template includes the following components (see examples of written success stories in Appendix 2):

1) CTP Focus Area (topics as found in Appendix 8)

2) NERRS Priority Issue (Water Quality, Habitat Protection and/or Climate Change)

3) Performance Measure (Select one of the following)

- CDMs use science-based knowledge, skills and resources to support decisions and activities related to NERRS priority issues.

-OR-

- Decisions made and actions taken by CDMs reduce negative pressures on coastal ecosystems and NERRS watersheds. (Policy, ecological, or enforcement changes address priority ecosystem threats identified by reserve management plans and regional ocean/ coastal governance institutions.)

4) Summary Statement (a one-two sentence summary of the success story)

5) Relevance (see guidance below)

6) Response (see guidance below)

7) Results (see guidance below)

RELEVANCE

a) Clearly describes the issue or concern - why should people care?

b) Shows that the issue or need is appropriate for a CTP response

c) Includes data demonstrating need

NOTE: This is where a CTP Coordinator records how CTP's identification of gaps and barriers to communications, collaboration, or knowledge contributed to the design of effective programs and services.

RESPONSE (inputs and outputs)

a) Spells out CTP's role/contribution

b) Identifies participants: numbers and demographics of individuals, businesses, and/or communities that were reached

c) Identifies partnerships, if applicable

d) Identifies funding sources, if applicable

RESULTS (outcomes-impact)

a) Tells who/what benefited and how

b) Uses numeric and/or narrative data to describe important outcomes

c) Answers "So what?"; makes value clear to reader

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NOTE: This is where a CTP Coordinator records how CTP's identification of gaps and barriers to communications, collaboration, or knowledge contributed to the design of effective programs and services.
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RESULTS (outcomes-impact)
a) Tells who/what benefited and how
b) Uses numeric and/or narrative data to describe important outcomes
c) Answers "So what?"; makes value clear to reader
d) Links story to research, if appropriate
e) States future plans based on results
For a multi-year effort:
a) Shows important progress, includes updated timeline and milestones
b) Links work reporting periods and/or across years

d) Links story to research, if appropriate

e) States future plans based on results

For a multi-year effort:

a) Shows important progress, includes updated timeline and milestones

b) Links work reporting periods and/or across years

Success Story Writing Tips

It's one thing to have a good story to tell. It's another to write it so that people will want to read it. Use the following tips and the many resources on the Internet or in the literature for help in writing your success stories.

- Use an active, not passive, voice. For example, passive voice- "Wells were tested by 80 percent of the participants". vs. Active Voice- "Eighty percent of the participants tested their wells".

1. For help:
2. fromtheinside.us/**handbook**/misc/**Writing**Doc.pdf

https://owl.english.purdue.edu/owl/resource/539/01/

- Use short, complete sentences.

http://www.english.illinois.edu/-people-/faculty/debaron/essays/plain.htm

- Be concise.
- Choose simple words.
- Avoid jargon.
- Avoid acronyms.
- Write in paragraph style using complete sentences.

E. Training Events by Multiple Reserves

NOAA encourages partnering among Reserves and often multiple Reserves will co-host workshops. This has led to duplication in the data when multiple Reserves entered information for the same event.

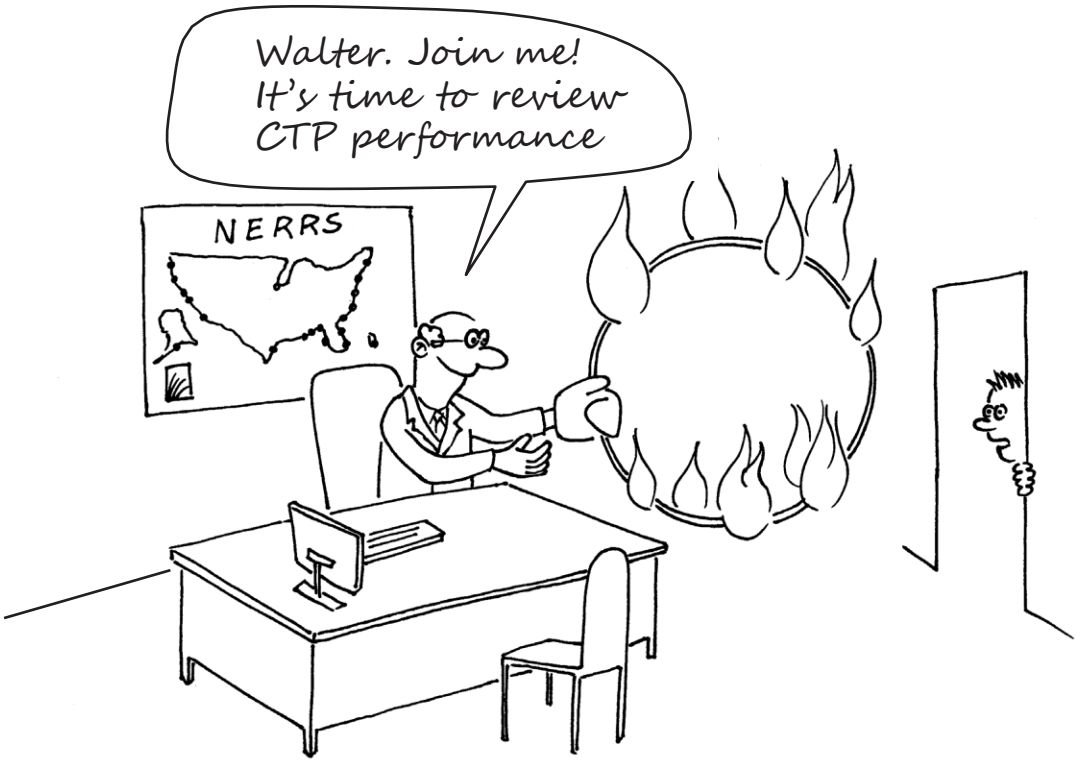
Until a permanent database reporting solution is implemented for shared training events, CTP Coordinators should adhere to the following interim solution.

1- If event is hosted by a specific Reserve, host Reserve records all of the performance monitoring data and lists the other reserves as partners. The partnering reserves can list this event under as "Technical Assistance".

2- If event is not hosted by a specific Reserve or is held at a neutral site, all participating reserves enter the information under the "Training Activities" and "Participant Affiliation" tabs but only the agreed upon reserve records the "Indicators" data. The other partnering reserves should make a note under the "Event Description" on the "Training Activities" tab as to who has entered the "Indicators" data.

In the near future when the database is revised, a permanent solution will be in place.

V. DATA COLLECTION, TRACKING, AND RECORDING METHODS



This section gives suggestions for how information and data can be collected to facilitate performance reporting.

Post-event Evaluation Data

Data collected during post-event surveys can be collected and stored in several ways. Evaluations can be given in paper or web format immediately after the workshop, as technology allows, or electronic or web-based evaluations can be emailed to workshop participants shortly after the event. It is best to keep the time frame between the event completion and post-event evaluation distribution as short as possible to ensure a high response rate and to enhance the accuracy and quality of comments.

The data from each participant's individual forms should be compiled and summarized in a single place for each workshop (e.g., Word document, Excel spreadsheet, Survey Monkey file) for easy review and transfer to the CTP Performance Monitoring Database.

This data serves many purposes beyond the meeting of national reporting requirements. If collected properly, it may also point out future outcomes participants expect to result from their participation in the event and where evidence of those outcomes may be found. By capturing and preserving this information in a centralized and easy to read document, you will facilitate your ability to track and report Outcome Statements and Success Stories for your program.

Mid-term and Long-term Outcomes

Mid Term Outcome 1: CDMs use science-based knowledge, skills and resources to support decisions and activities related to NERRS priority issues.

Long Term Outcome 2: Decisions made and actions taken by CDMs reduce negative pressures on coastal ecosystems and NERRS watersheds.

It is important to keep track of information which will be used in writing Outcome Statements and Success Stories (Section IIID). Information that can be used to describe mid and long-term outcomes is the hardest to track because it may be received passively in a variety of ways, such as a personal conversation or email, a newspaper article, or presentation. For example, a CTP Coordinator may learn from a third party that a watershed group developed a logic model to create a watershed plan, which was a direct result of their attendance at a Project Design and Evaluation Course.

It is important to set up a method to store this information, which may be as simple as making a mental note of the information or jotting it down and placing it in a paper or electronic file. The Coordinator can then follow up with the CDMs to get more information if necessary. Setting up a good collection method will make reporting mid and long-term outcomes in the Outcome Statements and Success Stories much easier.

Actively collecting this information may be done by surveying CDMs 6 to 36 months after a training event. Surveys can be electronic or by personal interview. Asking an additional question on an evaluation form, such as "Can we contact you in six to twelve months to ask you how you used what you learned in your work?" might be helpful in getting this information.

(photo credit: Christine Feurt)

Collecting information on gaps and barriers

Activity 1: Identify gaps in, and barriers to, communication, collaboration or knowledge at individual and programmatic scales.

Information on gaps and barriers can be determined by using a variety of tools such as surveys, personal interviews, focus groups and case studies, and informal needs assessments from audience response, observation, questions on post-event evaluation forms and six-month follow-ups.

(Not) Tracking Investments in the Coastal Training Program

A pilot effort to track overall workshop investment in dollars and source of the invested resources (315 funds, external funds, and in-kind resources) was conducted in FY 2011-13. There is no associated indicator; information was collected for tracking purposes only. See Appendix 15 for details.

VI. SCHEDULE OF REPORTING

Field class (photo credit: Avia Huisman)

Each Reserve is required to report performance data semi-annually based on their NERRS 315 Operations award grants cycle. Most reserves reporting are tied to the State/University fiscal year. In the case of CTP, events and outcomes can be input into the Performance Monitoring Database at any time during the fiscal year. However, OCRM/CSC will review data on the reserve's semi-annual reporting cycle. Chart 1 denotes the reporting schedules for Reserves.

Chart 1. Reserve Reporting Cycles

Reserve	Annual Reporting Period 1	Annual Reporting Period 2
ACE Basin, Apalachicola, Elkhorn Slough, Grand Bay, Great Bay, GTM, Hudson River, Kachemak Bay, North Carolina, NI-WB, Old Woman Creek, Padilla Bay, Rookery Bay, San Francisco Bay, South Slough, Tijuana River, Waquoit Bay, Wells	July 1 – December 31	January 1 – June 30
Chesapeake Bay VA, Mission-Aransas, Narragansett Bay	September 1 – February 28	March 1 – August 30
Chesapeake Bay MD, Delaware, Jacques Cousteau, Jobos Bay, Weeks Bay	October 1 – March 31	April 1 – September 30
Sapelo Island	November 1 – April 28	May 1 – October 31

VII. PERFORMANCE MONITORING DATABASE

Celebrating the opening of the new Research and Education Laboratory at Elkhorn Slough Reserve (photo credit: George Cathcart)

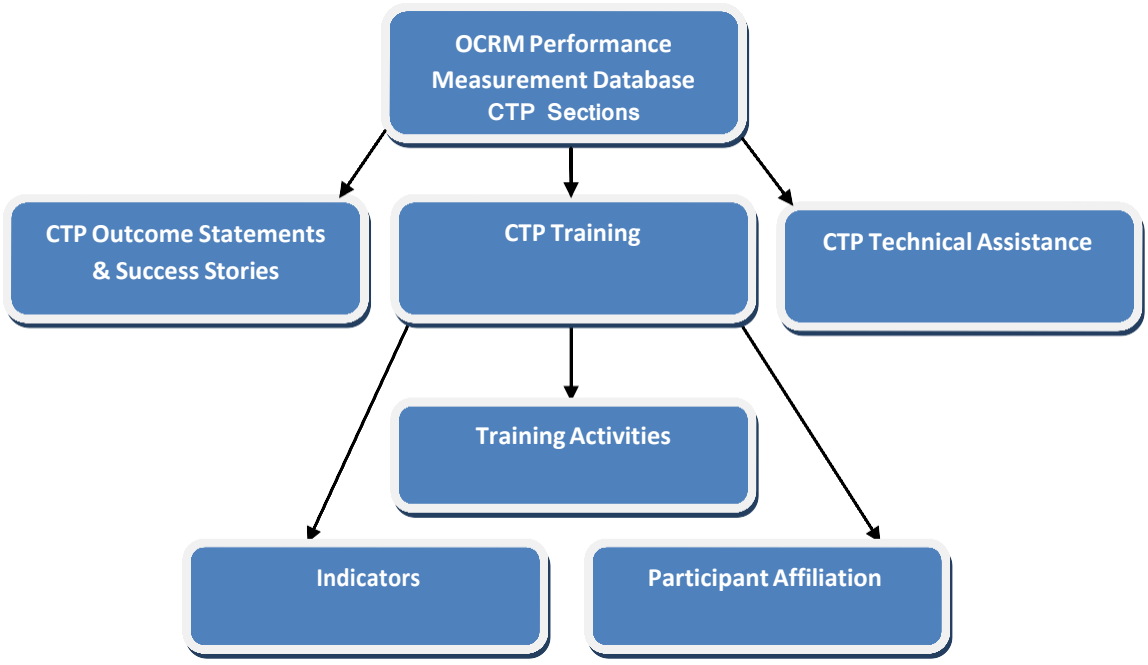
The Performance Monitoring Database is a web-based accessible database that combines all of the performance data collected under the Coastal Zone Management Act (CZMA). Managed by OCRM/CSC and Reserves as a:

- Tool to collect and report on performance data
- Repository of current and historical performance data
- Tool to help OCRM/CSC evaluate performance at a Reserve, Regional and National scale
- Tool to help Reserve staff evaluate performance
- Tool to support 312 Evaluations of Coastal Program and Reserves
- Tool to conduct trends analyses of important indicators and programs
- Mechanism to efficiently collect performance data from different sources
- Tool for generating data products and reports

The database is used across the Reserve System. Outside of the CTP reported data, OCRM/CSC is responsible for entering national- level performance data into the new system. Programmatically, Research Coordinators continue to use the existing NERRS Research Database to collect information on NERRS Research and Monitoring projects and products. The Performance Monitoring Database grabs research performance data (number of projects and products) directly from the Research Database.

Non-CTP NERRS education performance data are entered separately into the database. The indicators and outcomes which Education Coordinators collect are similar in format to what CTP reports. While details of outcome reporting vary between Education and CTP, outcomes are structured across the two sectors so that critical information is collected in a consistent manner and reporting is similar. At a minimum, all outcomes will record the NERRS priority area(s), specific goals and objectives that

Chart 2: CTP Database Framework



Detailed instructions on how to use the Performance Monitoring Database are included in Appendix 11 of the manual. Detailed information on database reporting and synthesis is including in Appendix 12 of the manual.

are addressed, an activity summary, and outcome statements. In this way, sector-specific outcome measures are standardized to the greatest extent possible within the database.

At the time of the rollout of the performance database, there are no sector-specific outcome measures associated with the Protected Places and Science Goals of the NERRS Strategic Plan. Any additional outcomes developed in the future for these two goals will be captured in a similar way.

The combination of all NERRS performance data within one database system allows for analysis of Reserve and system-wide performance across all Reserve program areas. A full picture of performance for Reserves enables NOAA and our state partners to actively improve the operating efficiency, effectiveness and quality of reserve services.

The database offers coordinators a centralized place to manage and archive performance data. For data entry, submission, review, analysis and data products, the database is a significant improvement over the previous data reporting structure. With an easy to use interface, Coordinators can efficiently manage their performance data and generate products from that data. Here is some basic information about the ~~new~~ database:

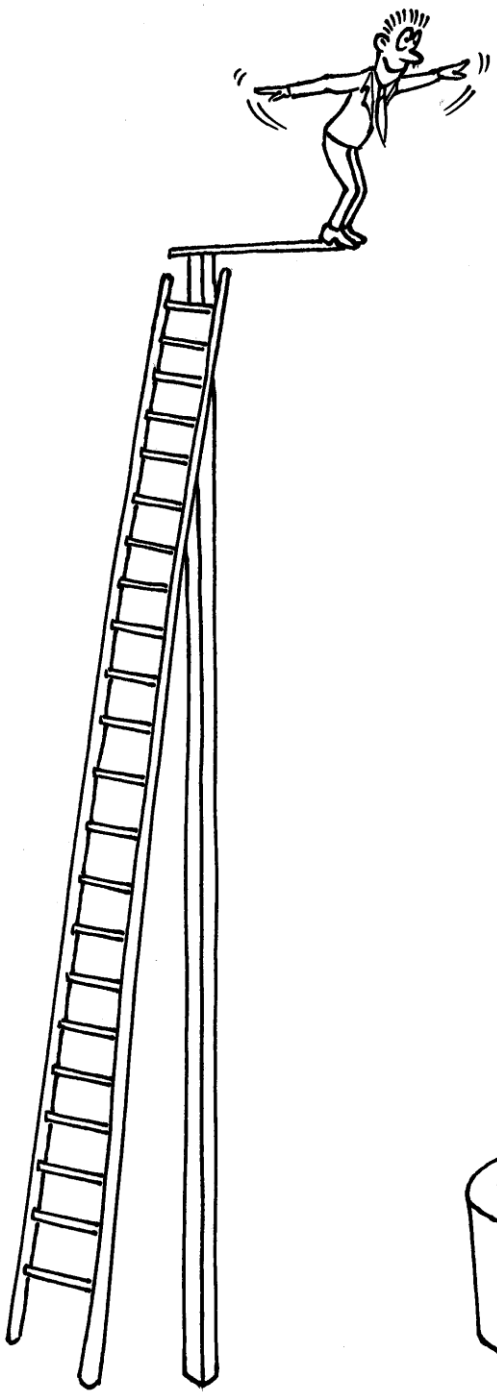
1. Password Protected - Only authorized individuals at the Reserve and NOAA will be able to enter data or generate reports from the stored data.
2. Uses Logic Model-based Performance Indicators – The system incorporates the revised CTP performance indicators and associated tracking data approved in 2010.
3. Preserves Historical Data – The system will incorporate all historical CTP performance data. The storage of the historical data enables CTP Coordinators to develop trend analyses to answer specific performance questions.
4. Standardize Query Functions – Common data query functions will enable CTP Coordinators to quickly and accurately generate products from performance data.
5. Link with other Reserve Data – The system enables CTP Coordinators and others to develop queries that incorporate non-CTP performance data.

With all the benefits provided by the Performance Monitoring Database, it is important to recognize that performance reporting is different from grants reporting. Some of the data for each reporting requirement will be identical; however, they are two separate processes. See the FAQ section (Appendix 2) for more information.

Navigating the Database Design Framework

The Performance Monitoring Database is structured to enable different individuals and organizations to access, input and use performance data. Access is password protected for authorized users and there is a common workflow for users. Each authorized user has access to specific database entry and reporting screens. The CTP specific part of the database is structured as shown in Chart 2.

VIII. CTP PERFORMANCE STANDARDS



Performance Monitoring Standards for CTP have been set by the OCRM/CSC with input from the CTP performance monitoring workgroup and the CTP community at large. Using a tri-element model, the standards include quantitative, qualitative and a success-oriented elements. Each is based on an existing performance indicator. Previously, CTP developed performance minimums based on each of the original program performance measures (i.e., 14 indicators). In 2010, CTP updated its logic model and performance indicators to improve program accountability, evaluate program performance and to better communicate program success. The 2011 standards include the following:

- Quantitative Element – "Capacity Based Floor"

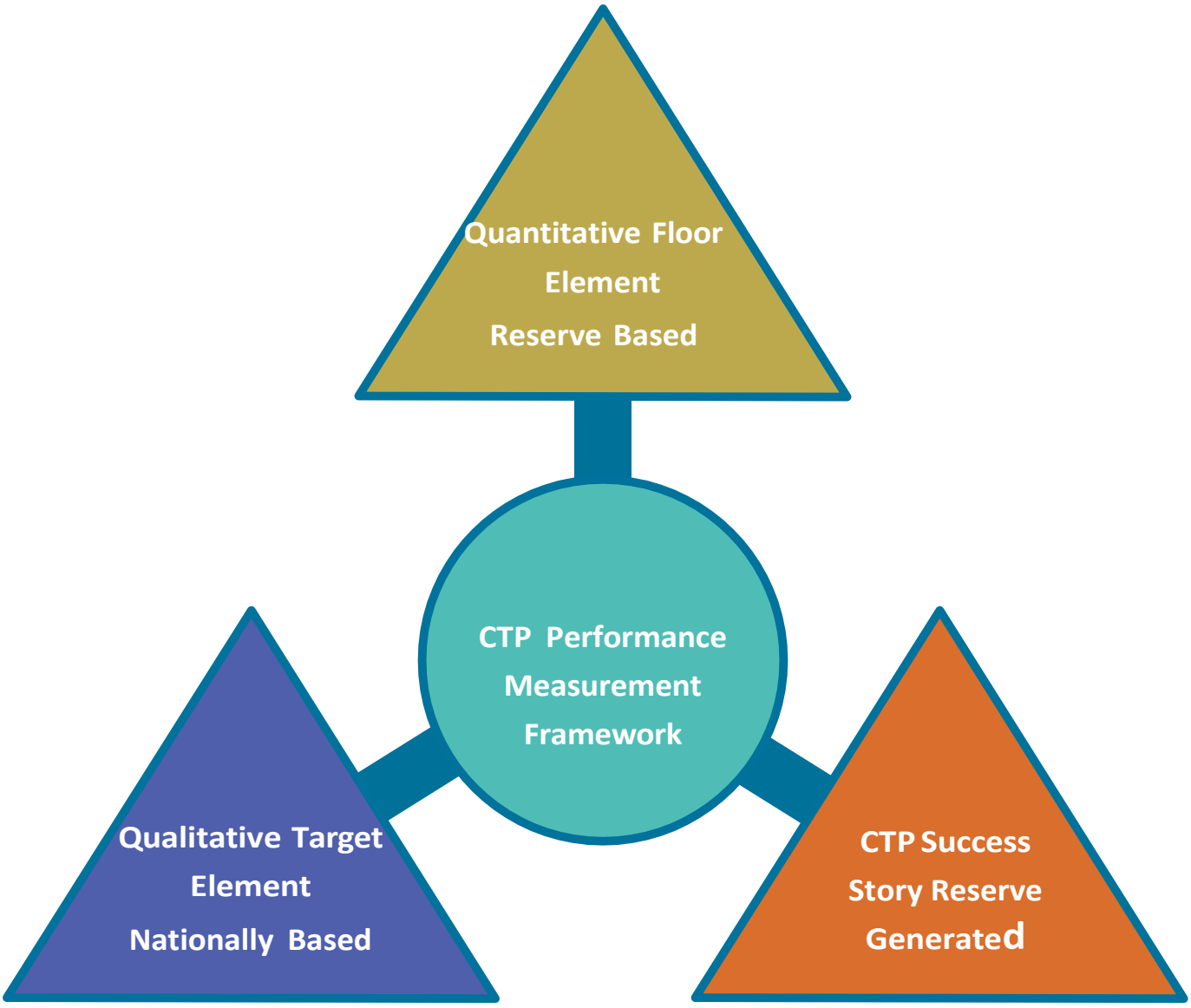
  Maintain capacity to deliver at least 5 CDM training events annually for each approved CTP

  Original Concept: Create reserve minimum for one or more quantitative indicators. Forms an objective basis for expectations (NOAA accountability)

- Qualitative Element 1 – "National CTP Target"

  90% of the CDMs participating in CTP training or services report they plan to apply what they learned in their work or decisions.

Original Concept: Create a national target for the overall program. Forms an objective basis for expectations (NOAA accountability)



- Qualitative Element 2 – "Reserve Generated Success Story"

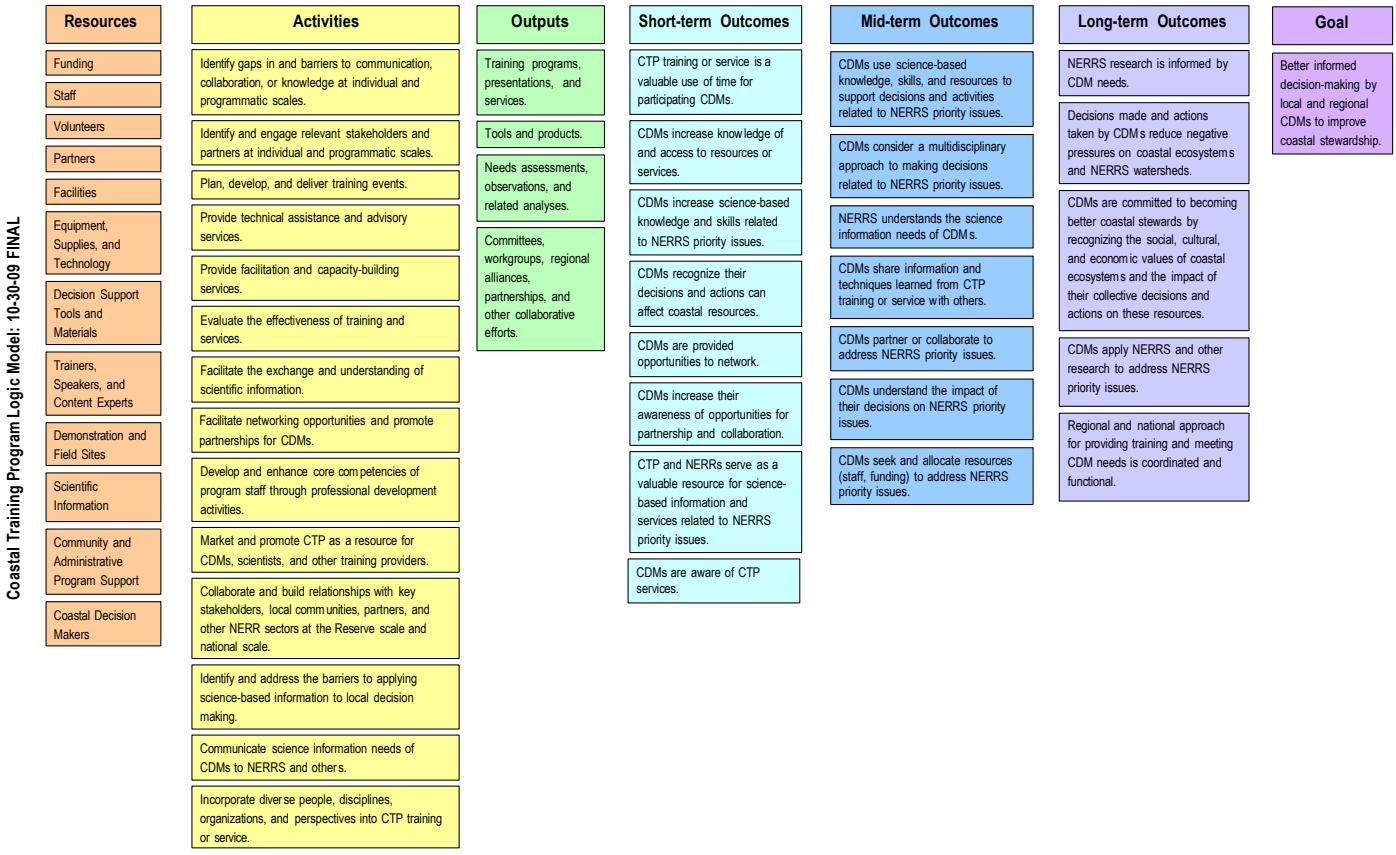
  Reserve CTP will annually submit at least one success story linked to CTP outcomes.

  Original Concept: Identify individual reserve CTP success story linked to mid to long-term outcomes. Annually, Reserve CTPs capture one or more success stories for their program. Each story is captured within the Performance Monitoring Database and is linked to one of CTPs mid to long-term outcomes identified on the National CTP logic model.

APPENDIX 1: CTP LOGIC MODEL

Coastal Training Program Logic Model: 10-30-09 FINAL

Situation Statement	Assumptions	External Factors
THE SITUATION Severe storms, climate change, sea level rise, air and water pollution, loss of wildlife habitat, and prior land use planning threaten the health of our nation's coasts and the safety and welfare of people who live there. People depend on healthy estuaries and other coastal ecosystems for food, harbors, transportation, livelihoods, flood protection, and recreation. Additionally, these ecosystems support abundant plant and animal communities and serve as foraging and nursery grounds, corridors for movement, and refugia. Today, more than half of the United States population is located within 50 miles of the coast and generates nearly 60% of the United States gross domestic product (Crossett 2004). Combined, climate and human related factors, such as society's dependence on and use of the coastal lands and waters, creates enormous and increasingly evident pressures on coastal communities and ecosystems. These impacts include increased pollution, degradation of commercial fish stocks, and the loss of natural areas and open space to growth and development. In turn, risks to human populations from the coastal environment include health risks associated with poor water quality, food shortages as fisheries struggle to support human demands, and property damage from storms and other hazards. People who have made official decisions about coastal resources often did so with the best scientific information available to them at the time. However, scientific discovery is rapidly evolving, new tools are always in development, and oftentimes new information negates old information. Furthermore, access to relevant information can be difficult. Therefore, past decisions may not coincide with today's best available knowledge, and may have led to adverse conditions in coastal regions. The experience of the last century has shown that, because coastal issues are so complex, access to the best available scientific knowledge is crucial for managing the nation's coasts today. A growing number of agencies and organizations recognize the value of coastal education and training, and while some already provide science-based training, their efforts often lack coordination. **ADDRESSING THE SITUATION** NOAA has responded by establishing nationwide programs aimed at systematic training and education. One such program in NOAA's National Estuarine Research Reserve System, the Coastal Training Program, began by asking local officials, planners, regulators, and other decision makers what types of scientific and technical information or training they need to make better decisions for their communities. CTP then provides appropriate, needs-based training and science-based information whose relevance is enhanced by the place-based nature of the Reserves. In addition to this local, needs-based approach, CTP also responds to agency (NERRS and NOAA) priorities, enabling CTP to play a role at the individual Reserve and community level and also play a role in the larger NOAA vision. Improving the management and use of coastal resources and services is vital to ensuring that healthy coastal ecosystems are protected and sustained. In turn, protecting and restoring coastal ecosystems will enhance coastal community resiliency to hazards and climate change, and will ensure that our future needs from these coastal ecosystems are met.	CTP periodically reanalyzes training markets, CDMs, and CDM training needs. CDMs are able to access CTP services relevant to their roles and work. Appropriate CDMs seek and participate in CTP trainings and services relevant to their roles and work. CDMs who become aware of the CTP will seek out the services it provides and spread awareness of the program. NERRS funding for CTP to address coastal management issues is sustained. NERRS, NERRS partners, and other research programs conduct applied research relevant to estuarine and coastal conservation or management. NERRS managers understand and support the development of core skills necessary to be an effective CTP coordinator. CDM actions are motivated by sound science and full cost analysis. Adequate resources exist to support the CTP. CTP partners with appropriate groups internally and externally to meet needs and achieve program goals. Multidisciplinary perspectives or approaches will lead to better or more informed decisions. Adequate and relevant science that addresses CDM needs exists and is accessible by CTP and by CDMs.	Impacts of expanding coastal populations, a changing climate, and other negative pressures to coastal ecosystems and communities may occur too rapidly for the latest scientific information to remain relevant to decision making. Federal, state, and local budget priorities. Political, social, economic, and cultural conditions. Agreements and collaboration among CTP, other NERR sectors, and the NERRS as a whole are necessary to achieve the research-related outcomes presented in the logic model. CTP envisions these as the role of CTP in relation to NERRS research, but the reality of this is heavily dependent upon the views and commitments of others outside the CTP sector as well.


Coastal Training Program Logic Model: 10-30-09 FINAL
Resources
Funding
Staff
Volunteers
Partners
Facilities
Equipment, Supplies, and Technology
Decision Support Tools and Materials
Trainers, Speakers, and Content Experts
Demonstration and Field Sites
Scientific Information
Community and Administrative Program Support
Coastal Decision Makers
Activities
Identify gaps in and barriers to communication, collaboration, or knowledge at individual and programmatic scales.
Identify and engage relevant stakeholders and partners at individual and programmatic scales.
Plan, develop, and deliver training events.
Provide technical assistance and advisory services.
Provide facilitation and capacity-building services.
Evaluate the effectiveness of training and services.
Facilitate the exchange and understanding of scientific information.
Facilitate networking opportunities and promote partnerships for CDMs.
Develop and enhance core competencies of program staff through professional development activities.
Market and promote CTP as a resource for CDMs, scientists, and other training providers.
Collaborate and build relationships with key stakeholders, local communities, partners, and other NERR sectors at the Reserve scale and national scale.
Identify and address the barriers to applying science-based information to local decision making.
Communicate science information needs of CDMs to NERRS and others.
Incorporate diverse people, disciplines, organizations, and perspectives into CTP training or service.
Outputs
Training programs, presentations, and services.
Tools and products.
Needs assessments, observations, and related analyses.
Committees, workgroups, regional alliances, partnerships, and other collaborative efforts.
Short-term Outcomes
CTP training or service is a valuable use of time for participating CDMs.
CDMs increase knowledge of and access to resources or services.
CDMs increase science-based knowledge and skills related to NERRS priority issues.
CDMs recognize their decisions and actions can affect coastal resources.
CDMs are provided opportunities to network.
CDMs increase their awareness of opportunities for partnership and collaboration.
CTP and NERRs serve as a valuable resource for science-based information and services related to NERRS priority issues.
CDMs are aware of CTP services.
Mid-term Outcomes
CDMs use science-based knowledge, skills, and resources to support decisions and activities related to NERRS priority issues.
CDMs consider a multidisciplinary approach to making decisions related to NERRS priority issues.
NERRS understands the science information needs of CDMs.
CDMs share information and techniques learned from CTP training or service with others.
CDMs partner or collaborate to address NERRS priority issues.
CDMs understand the impact of their decisions on NERRS priority issues.
CDMs seek and allocate resources (staff, funding) to address NERRS priority issues.
Long-term Outcomes
NERRS research is informed by CDM needs.
Decisions made and actions taken by CDMs reduce negative pressures on coastal ecosystems and NERRS watersheds.
CDMs are committed to becoming better coastal stewards by recognizing the social, cultural, and economic values of coastal ecosystems and the impact of their collective decisions and actions on these resources.
CDMs apply NERRS and other research to address NERRS priority issues.
Regional and national approach for providing training and meeting CDM needs is coordinated and functional.
Goal
Better informed decision-making by local and regional CDMs to improve coastal stewardship.

Coastal Training Program Logic Model Definitions 2009

GIS Training (photo credit: Avia Huisman)

Activities – Work performed to achieve the desired outcomes, produce the necessary outputs, or obtain resources. Activities are also known as processes. Examples: Facilitating dialogues, organizing training and networking opportunities; workshop planning and management; technical assistance planning, coordination, and management; developing publications, video resources, or other outreach materials.

Assumptions – Principles, beliefs, and ideas about (1) the problem or situation the logic model addresses, (2) CTP resources, staffing capability, and program operations, (3) what the CTP expects to achieve, (4) the environment in which the CTP operates, (5) the resources and capabilities of individual CTPs at individual Reserves, and (6) how CDMs are motivated, learn, and behave. Example – Science– based information relevant to specific coastal management issues exists and is accessible.

Coastal Decision–Makers – Individuals who regularly make decisions about coastal resources in a professional or volunteer capacity. Examples – local government staff and officials, developers, land use planners, contractors.

Decision Support Systems or Tools (DSS) – Systems that facilitate the use of data and models in the decision-making process. Systems integrate environmental data and simulation or conceptual models into a framework for making site characterizations and development decisions, and environmental monitoring, protection, or restoration decisions. Example – Impervious Surface Analysis Tool – Calculates the percentage of impervious surface in a user– selected geographic area to estimate how changes in land use management will affect imperviousness.

External Factors – The cultural milieu, climate, economic structure, housing patterns, demographic patterns, political environment, background and experiences of program participants, media influence, changing policies and priorities within which CTP operates that interact with the program, both influencing CTP's ability to achieve intended outcomes and influenced by CTP itself. Example– Federal and state budget priorities.

Goal – The overarching purpose of CTP in light of the NERRS vision. An effective goal closes the gap between the vision and current situation. Example – Better informed

decision– making by local and regional CDMs to improve coastal stewardship.

Mission – Who we are, what we do, who our audience is, and how we work toward our outcomes. Example (NERRS) – To practice and promote coastal and estuarine stewardship through innovative research and education by using a system of protected areas.

Multidisciplinary – Composed of, combining, or making use of several usually separate branches of learning or fields of expertise at once. This term is used in the logic model with the assumption that if CDMs use multidisciplinary approaches to their decision-making, such as considering ecological, social, and economic impacts of their decisions, that it will lead to decisions that are more sound and more likely to protect coastal resources and achieve other long – term resource goals of NERRS and CTP.

NERRS Priority Issues – Coastal management or environmental issues that are of high importance to the National Estuarine Research Reserve System. Priority issues are identified through a collaborative strategic planning process. References to NERRS priority issues in the logic model do not assume that CDMs specifically identify coastal issues as NERRS priorities, but rather that many coastal issues prioritized by CDMs also align with NERRS priorities (as demonstrated by CTP needs assessments).

Objectives – Logic model objectives follow the SMART model (Specific, Measurable, Audience– directed, Realistic, and Time– bound Statements) about outcomes. Objectives are statements about specific outcomes or results of CTP. Example – Local and regional CDMs increasingly apply science– based knowledge and skills in their work related to NERRS priority issues.

Outcome, Long–term – The intended ultimate impact of the Coastal Training Program upon social, economic, or environmental conditions (five years and beyond). These results are expected to occur after a certain number of behavior changes have been made in the short– and mid– term. The CTP has less direct influence over long– term outcomes because, as the time horizon extends, there are many more influences on decisions than discreet CTP trainings or services. Long– term outcomes often reflect changes in behavior. Example – Structural and nonstructural pollution controls are implemented that aim to protect or restore water quality within reserve watersheds.

Outcome, Mid– term – The expected changes to or impacts on behavior that can be connected to, but are not solely dependent on, the Coastal Training Program, a training event, or service (six months and beyond), and is expected after a short– term outcome is achieved. Mid– term outcomes often reflect changes in attitudes or beliefs. Example – NERRS staff understand the science information needs of CDMs.

Outcome, Short– term – The expected immediate change in knowledge and awareness resulting from participation in a CTP training or service. This includes audience reactions and changes in knowledge, skills, abilities, or attitudes during, immediately following, or up to six months following participation in event or activity. Short-term outcomes often reflect changes in knowledge. Example: CDMs increase science– based knowledge and skills related to NERRS priority issues.

Outputs – The physical products and services resulting from activities that support achieving the desired outcomes. Example – Training programs, tools and products.

Participation – Engagement with the Coastal Training Program at a Reserve. Examples – Other training providers enter into a partnership with a CTP to provide training; CDMs engage in focus groups or community education forums; local agencies request technical assistance and scientific expertise from a Reserve's CTP and research program.

Resources – Time, money, staff, work effort, facilities, equipment, supplies, agencies, partners, and management support available or necessary to conduct the activities and achieve the objectives and goals of the Coastal Training Program. Examples – Trainers, speakers, experts, grants and in– kind support, partnerships, audio– visual equipment, etc.

Science and Science–Based Knowledge – Refers to both "hard" and "soft" sciences, including biology, ecology, physics, sociology, economics, physical sciences and engineering, political science,

and other sciences that relate to issues addressed by the CTP.

Situation statement – A succinct but thorough description of the sociopolitical, environmental, and economic conditions in which the CTP operates. The statement defines problems or issues in context, and describes stakeholders, causes, impacts, and the state of knowledge of coastal management challenges and decision-making.

The situation statement should answer the following questions:

1. What is the problem or issue?
2. Why is this a problem and what causes the problem?
3. For whom does this problem exist (individual, household, group, community, society in general)?
4. Who else has a stake in the problem, or in solving it? (Who cares whether it is resolved or not? Who doesn't want it to be resolved? Why?)
5. What do we know about the problem, issue, or people that are involved? What research and experience do we have? What do existing research and experience say?

Technical Assistance – Technical assistance is service provided to CDMs that supports and contributes to the outcome(s) and goals of the CTP. See Appendix 4 for a detailed explanation of the process to use to determine if an activity is considered technical assistance.

Training Event – Training events are provided to CDMs in order to support and contribute to the outcome(s) and goal of the Coastal Training Program.

Vision – What the world will be like if we are totally successful in reaching our aspirations. A description of the ideal future. Example (NERRS) – Healthy estuaries and coastal watersheds where coastal communities and ecosystems thrive.

Recommended Reference - (McCawley 1997)

Note: Technical Assistance and Training Events are not specific definitions but a process for determining if an activity falls under one or the other category and is based on Section III of the manual.

(photo credit: Christine Feurt)

APPENDIX 2: FREQUENTLY ASKED QUESTIONS

1. **Do I need to include all the REQUIRED post-event survey questions in all my evaluated events?**

   Yes. The three required post-event survey evaluation questions provide participant data for short term outcomes 1 and 3 of the logic model and mid-term bridge 1 which the CTP community collectively agreed to track system-wide.

   You will also need to keep track of the quantitative indicators, i.e., number of events, contact hours and funding for training events and technical assistance projects.

2. **Can I re-word the REQUIRED questions in more appropriate language to my program?**

   No. It is critical to keep the same wording and format, i.e., scaled questions remain scaled, yes/no questions remain yes/no. The reason for this is to ensure comparability and consistency in reporting. Changing the required questions will affect the validity and credibility of CTP performance data.

3. **Can I add additional questions on CTP event evaluation forms?**

   Yes. The required post-event survey questions are only a minimum, and are the ones that you must report on. However, you may want to include additional or more specific questions around training content, format, effectiveness of various program elements, what participants liked, what they would improve, solicit comments on participant interest in additional trainings, find out how they heard about your program, etc. Examples of optional questions are given on Pages 16 and 17 but you are not limited to just these suggestions. You can develop and incorporate your own optional questions as long as these are asked in addition to the required questions and not instead of these.

4. **How often and to whom do I need to report on performance measures?**

   The new performance monitoring database will enable Coordinators to submit performance data on an ongoing basis. Entered data can be marked DRAFT until it is ready to be submitted to OCRM/CSC. Performance data is officially due at the same time as your Reserves semi-annual operations grant progress report, see Table 1 on Page 35. Once submitted the data will be marked submitted. Please note that success stories should only be written when there is truly a success and linked to mid to long-term outcomes. However, under the new performance standards, CTPs will work to describe at least one success story annually in the database.

5. **Where can I access summary data on these measures from across the NERRS?**

   Summary data will be available from the performance monitoring database. You will be able to perform certain queries in the database and results will be made available from the database report page. Note that you will be assigned a username and password based on your reserve and your role at the reserve. Your username and password will allow you to access your own CTP performance data and various analyses and reporting functions. See Appendix 11 for more information on using the database and accessing summary data.

6. **Will I need to set targets for performance at the beginning of every grant cycle?**

Yes. For each grant cycle, each Reserve is required to offer five decision-maker training events annually; aim to have 90% of the CDMs participating in their training or services report they plan to apply what they learned in their work or decisions; and aim to submit at least one success story annually. Appendix 13 addresses performance standards and provides more detailed information.

7. Will I be penalized if our reserve "results" are lower than expected, or rewarded if they are higher?

Based on the results of the External Review, OCRM/CSC and the Performance Monitoring Workgroup have developed a refined set of reserve performance standards. These standards are detailed within the body of the manual and Appendix 13. Subsequent to the implementation of those standards, OCRM/CSC, in collaboration with the workgroup, will develop a process to a process to review annual performance.

8. Can I generate a report from the database and submit it for my 315 progress report?

There are two forms of reporting that CTP Coordinators will have to do: Performance and Progress. CTP Coordinators will have to report performance measures as agreed upon in the governance process and also in the form of outcome statements and success stories. CTP Coordinators will also have to provide a description of progress for their 315 grant reports. A large portion of your progress report will likely be a "report out" or summary from your PMs, but it will also need to include supplemental information that relates directly to the grant application. The table below shows the difference between the two reporting systems.

Hydric Soils Workshop - Grand Bay NERR
(photo credit: Marian Hanisko)

8. How do I write success stories on the same program over consecutive years?

When you have significant results in a multi-year effort, report the new results. You may want to identify stories by date, for example, "Living Shorelines 2010," "Living Shorelines 2011."

Table 1: Comparison between two reporting requirements

Functions	Progress Reporting (315 Grant)	Performance Reporting
Reporting Schedule	Semi-Annual	Semi-Annual or as activities are input into the system
Reporting Application	NOAA Grants Online	OCRM Performance Monitoring Database
Type of Data Captured	Grant Tasks & Outcomes Progress	Performance indicators and tracking data
Format	Progress Report	Database entry screens

*Performance data is not a substitute for operations grant reporting

9. Many of my program efforts are multi-year in nature; there isn't a neat relationship between what I do in a given year and what results. In fact, results may not appear for several years. How do I report this?

Keep track of the resources and series of events or activities that make up your program. These resources and events are inputs and outputs that lead to outcomes. Document outcomes when they occur and link them to the inputs and outputs that occurred previously.

10. Can I include photos, graphics or illustrations?

No. The electronic database only accommodates text. However, if you do have photos or other graphics, indicate that in your success story and save them to your computer. They'll come in handy for when OCRM/CSC or your state partner is compiling fact sheets, news stories and reports.

11. My success story is too long for the database. What should I do?

Edit. Edit. Edit. Keep the vital information. Use short sentences and simple words.

12. How should I write about events or activities that don't constitute a success story?

Consider writing an outcome statement and/or sharing the event in a newsletter, committee report or on your office bulletin board.

13. Can I write a success story that spans more than one year?

Yes.

(photo credit: Christine Feurt)

APPENDIX 3: ADDITIONAL BACKGROUND AND HISTORY OF CTP PERFORMANCE MEASURES

In early 2000, NERRS Education Coordinators, CTP Coordinators, the CTP Oversight Committee and a CTP Performance Measures Workgroup worked hard to develop the initial logic model and framework for measuring performance of the Coastal Training Program. The CTP logic model helped focus program development efforts and identify common indicators for tracking progress in this emerging program. The logic model provided the program with a framework for monitoring progress towards addressing Goal One of the 2003 NERRS Strategic Plan: "To improve coastal decision making by generating and transferring knowledge about coastal ecosystems."

The logic model helped articulate an outcome-based goal and objectives for the Coastal Training Program, as well as key results that the workgroup believed would show progress toward meeting the goal. The "key results" statements described intermediate outcomes that contributed directly to objective-level results statements. These results statements also provided context for the selection of indicators that were developed and piloted across the NERRS CTP community and finalized in early editions of the NERRS CTP Performance Monitoring Manual.

Following the development of a logic model and indicators, baseline data collected between July 2004 and June 2005 at the local level was used to establish system-wide minimum performance requirements for CTP. Minimum requirements were established in FY '06 for most of the performance indicators and this data was collected by CTP coordinators in each reserve's semi-annual progress report to NOAA as required through the annual operations grant of each reserve with an approved CTP program. In addition, the coordinators included a narrative report describing the challenges and accomplishments of their CTP programs during the reporting period. This combination of quantifiable data and qualitative information was agreed upon as evidence of the progress each reserve's CTP was making toward meeting program goals and objectives. Lastly, an elaborate peer-based performance evaluation process was established by the workgroup to identify exemplary reserves as well as reserves that are not meeting performance minimums.

It is to be noted that the minimum performance measures were originally set in 2006 knowing that the baseline data was collected inconsistently and missing data from about 20% of the reserves.

In February 2007, the Workgroup met to review performance data. For this first year of reporting, a reserve used a point-based system to identify underperforming programs. Using this system, many reserves were found to be underperforming. At that time, the Workgroup decided that it needed to re-evaluate the point structure associated with the data review so that fewer reserves fell into the

underperforming category. Hence, a new review protocol was agreed upon by the coordinators and a new year's worth of data was reviewed in January 2008.

Then in 2008, a team of seven experts was convened to conduct an external program review and to formulate options for improvement on (1) overall program structure, function, delivery, and promotion; (2) evaluation and performance measures; and (3) internal and external partnerships. Team members were selected because of expertise in their field(s) as well as training, education and outreach, evaluation, and management experience. The review found that the CTP performance measurement logic model has helped focus program development efforts and identify common indicators for tracking progress toward enhancing people's ability and willingness to make informed decisions and take responsible actions that affect coastal communities and ecosystems. However, the review panel found that the existing, detail-oriented CTP performance measurement system did not appear to serve its original purpose of informing NOAA managers, the NERRS, and its partners, constituents, and stakeholders of the overall effectiveness of the program. The panel recommended that CTP consider revisions to the evaluation process, including streamlining the process, focusing on gathering more qualitative information, and revising the evaluation form.

As a result, ERD and the CTP coordinators tasked the workgroup to take a new look at the performance measurement system and make changes that reflect the recommendations of the external review panel. The results of this effort included a new logic model, revised indicators, and this manual.

Beyond Pipe & Pond Workshop
(photo credit: Avia Huisman)

APPENDIX 4: GLOSSARY

(See also Appendix 1 and Appendix 3)

Coastal Decision-Makers (CDMs):

Individuals who regularly make decisions about coastal resources in a professional or volunteer capacity. Examples – local government staff and officials, developers, land use planners, contractors.

Impact Statements:

A few (4-7) sentences describing specific results from a training event, technical assistance, or other CTP service.

National Milestone:

90% of the CDMs participating in CTP training or services report they plan to apply what they learned in their work or decisions.

Tracking requirements:

All CTPs will capture the 1. Number of CTP Events, 2. Contact hours, 3. Number of CDMs reached, 4. Event duration, 5. CDM affiliation, 6. Event type, per semi-annual reporting period.

All CTP Coordinators will additionally deliver three required post-survey questions (see performance indicators below).

Performance indicators:

Post-event survey questions are a primary method of performance monitoring. The following REQUIRED "Post-event survey questions" must be asked word-for-word as written below. There are three required post-event survey questions.

1) Participating in this event was a good use of my time:

   5-Strongly agree

   4- Agree

   3-Neutral

   2-Disagree

   1-Strongly disagree

   Prefer not to answer/not applicable

2) How much did this training increase your knowledge of (NERRS priority issue)? OR

   How much did this training increase your skill or ability to use (technology, methodology, or BMP)?

   5-A great deal

   4-A lot

   3-Some 2-

   A little

   1-Not at all

   Prefer not to answer/not applicable

3) Did you learn something that you will apply in your work or future decisions?

Performance Standards:

1. Capacity Based Floor - Each Reserve delivers at least five CDM training events annually.
2. National CTP Target – Nationally, 90% of the CDMs participating in CTP training or services report they plan to apply what they learned in their work or decisions.
3. Reserve Generated Success Story - Each Reserve CTP will annually submit at least one success story linked to the CTP outcomes.

Performance monitoring:

Consistent tracking and post-survey methods that enable assessment of site- and system-wide CTP progress toward accomplishment "standards" and help to identify program development needs. The combination of quantitative and qualitative data allows evaluation of the CTP's utility, effectiveness, and efficiency.

Success stories:

More comprehensive narratives are appropriate when a CTP Coordinator has something more significant to report with the evaluation data and/or evidence to support it. These are the events and/or accomplishments that may well illustrate the highest potential of the CTP.

Technical assistance:

Technical assistance is service provided to CDMs that supports and contributes to the outcome(s) and goals of the CTP.

Questions to ask to determine if an activity is considered technical assistance:

- Is a CDM audience being served (i.e., do the individuals involved regularly make decisions about coastal resources)?
- Does the service contribute to an outcome identified in the CTP logic model? If so, how?
- Is this a substantive one time or repeated event that cannot be classified as training? (Please refer to the examples provided below)
- Was the assistance provided or coordinated by CTP or CTP-related staff?

If the answer is YES to all of the above, then the activity can be classified as technical assistance.

Examples of technical assistance:

- Facilitating meetings (must relate to CTP priority issues)
- Providing survey and evaluation assistance (must relate to CTP priority issues)
- Assisting partners with grant writing
- Assisting state agencies with plan revisions (e.g., a state resource classification guide, stormwater manual, etc.)
- Assisting natural resource managers with implementation of best management practices (e.g., helping to design and organize a stormwater webinar related to BMPs for state parks, assisting resource manager with a needs assessment survey, etc.)
- Developing GIS products (e.g., map of town's environmental resources, map local land acquisition priorities, etc.)
- Assisting land trusts/watershed councils with strategic/action planning
- Creation of a publication or website for use by CDMs
- Assistance writing comprehensive plans, ordinances etc.
- Serving in an advisory or leadership role on a committee/watershed group (with regular, active, contributions, i.e., these meetings are influenced by CTP participation)

Technical assistance is NOT:

- General program administration or maintenance (updating calendars, purchasing supplies, handing out/providing web access to publications, etc.)
- Attendance and/or participation at committees/watershed meetings where CTP's main objective is to "keep your finger on the pulse" of the community

- Dissemination of publications/websites
- Lectures to non-decision makers audiences where the outcome is audience awareness, not specifically designed for outcomes identified in the CTP logic model (e.g., presentation on the importance of reserve lands)

Training Events:

Training events are provided to CDMs in order to support and contribute to the outcome(s) and goal of the Coastal Training Program.

Questions to ask to determine if an event is considered training:

- Is this an event targeted and tailored to a group of CDMs?
- Does the event contribute to an outcome identified in the CTP logic model? If so, how?

If the answer is YES to all of the above, then the event can be classified as training.

Examples of trainings:

- Workshops
- Seminars
- Field experiences
- Demonstrations
- Conferences
- Distance-learning opportunities

APPENDIX 5: ACRONYMS DEFINED

For other Acronyms, see Coastal Training Program Orientation and Guidance Document (2011), Appendix F.

BMP	Best Management Practice
CDM	Coastal Decision Maker
CDMO	Central Data Management Office
CMP	Coastal Management Programs
CSC	NOAA's Coastal Services Center
CTP	Coastal Training Program
CTPC	Coastal Training Program Coordinator
ERD	NOAA's Estuarine Reserves Division
GIS	Geographic Information System
NERR	National Estuarine Research Reserve
NERRA	National Estuarine Research Reserve Association
NERRS	National Estuarine Research Reserve System
NGO	Non-Governmental Organization
NOAA	National Oceanic and Atmospheric Administration
OCRM	Office of Ocean and Coastal Resource Management
PMWG	Performance Monitoring Workgroup

APPENDIX 6: REFERENCES

A. CITATIONS FROM 2006 PM MANUAL

Cash D, Clark W, Alcock F, Dickson N, Eckley N, Jäger J. 2002. Salience, credibility, legitimacy and boundaries: linking research, assessment and decision making. John F. Kennedy School of Government Harvard University Faculty Research Working Papers Series. Harvard. 25 pp

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Suggestions to improve CTP performance monitoring, etc.

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Workshop attended by some CTP community members.

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Places performance monitoring in context with program design and evaluation.

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Suggestions to improve CTP performance monitoring, etc.

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Strategic plan outlines CTP priorities in NOAA context.

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Website offers language on CTP purpose.

NOAA. 2011b. Coastal Training Program Orientation and Guidance Document. Washington, DC: NOAA Estuarine Reserves Division Coastal Training Program.

Provides training to new coordinators on CTP performance monitoring and context.

NOAA. 2011c. 2011-2016 National Estuarine Research Reserve Strategic Plan. Washington, DC: NOAA Estuarine Reserves Division.

Strategic plan outlines CTP priorities in NERR context.

B. OTHER RESOURCES

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APPENDIX 7: WEB RESOURCES

REGULATORY BACKGROUND FOR REPORTING PERFORMANCE

Government Performance Results Act of 1993 – the roots of CTP performance monitoring:

http://www.whitehouse.gov/omb/mgmt-gpra/gplaw2m#h2

GRAMMAR SUPPORT

For help in using short, complete sentences:

http://www.grammarly.com/handbook/

For help in avoiding passive and using more active voice:

https://owl.english.purdue.edu/owl/resource/539/01/

LOGIC MODEL TEMPLATES

http://www.uwex.edu/ces/pdande/evaluation/evallogicmodelworksheets.html

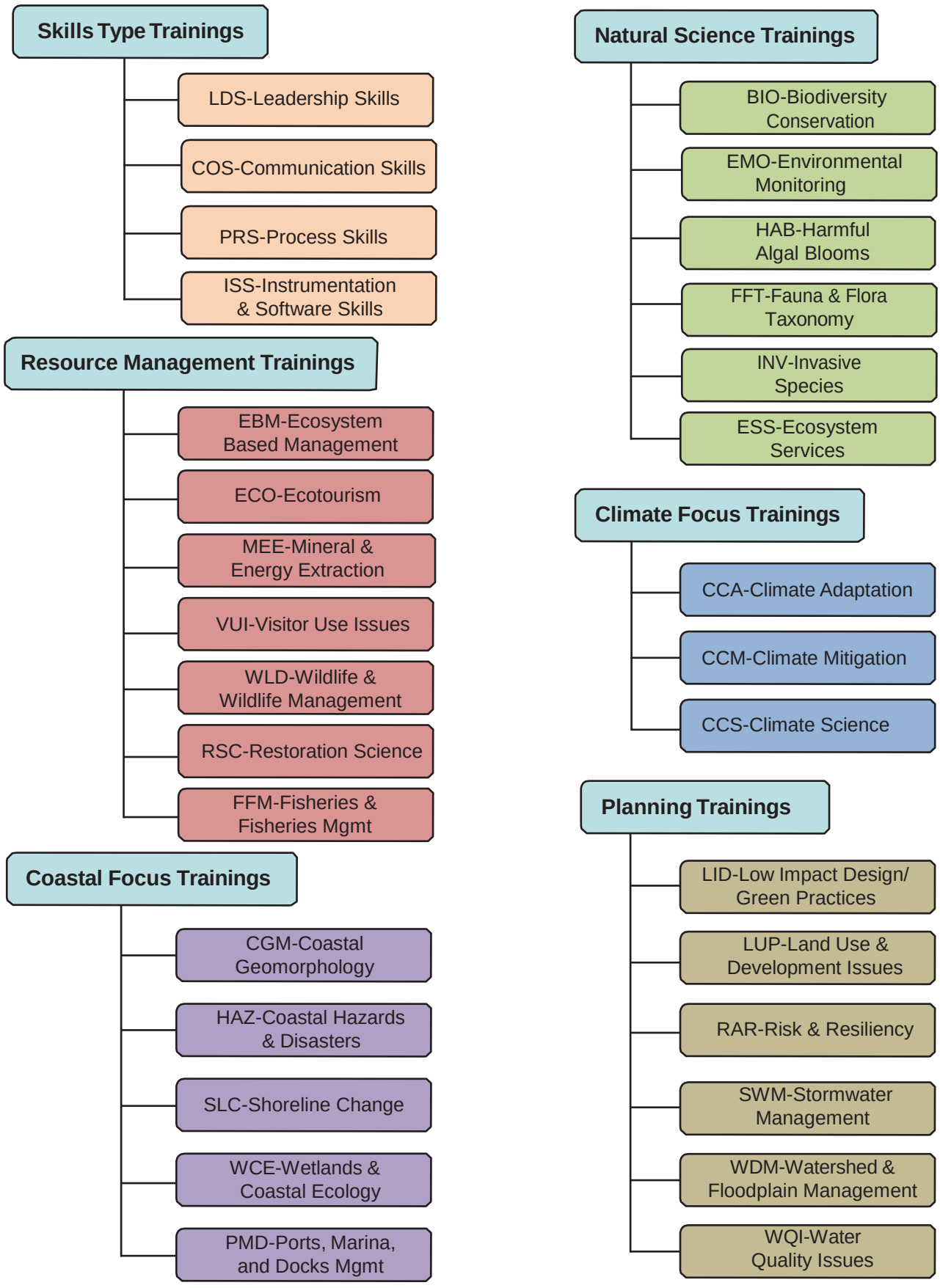
http://www.csc.noaa.gov/digitalcoast/publications/social-science-series

SUPPORT FOR WRITING EFFECTIVE NARRATIVES

University of Wisconsin Cooperative Extension Website. Success Story Guidance
http://www.uwex.edu/ces/techservices/prs/success.cfm

APPENDIX 8: CTP REPORTING SPREADSHEET TOPIC CATEGORIES & DEFINITIONS

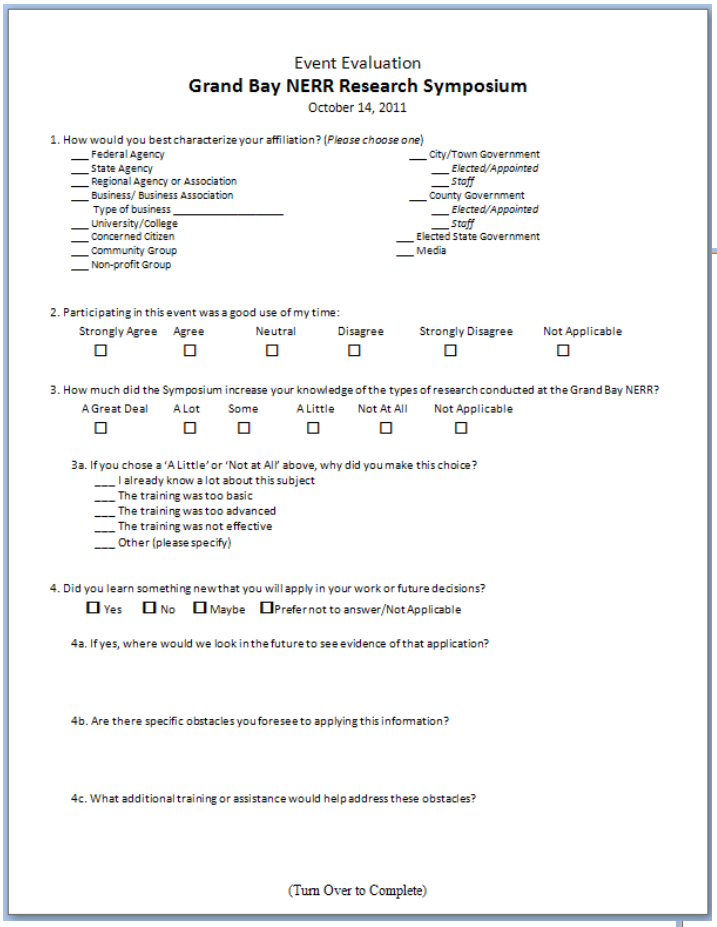
Sample Topical Structure of NERRS Coastal Training Program Workshops


Skills Type Trainings
LDS-Leadership Skills
COS-Communication Skills
PRS-Process Skills
ISS-Instrumentation & Software Skills
Resource Management Trainings
EBM-Ecosystem Based Management
ECO-Ecotourism
MEE-Mineral & Energy Extraction
VUI-Visitor Use Issues
WLD-Wildlife & Wildlife Management
RSC-Restoration Science
FFM-Fisheries & Fisheries Mgmt
Coastal Focus Trainings
CGM-Coastal Geomorphology
HAZ-Coastal Hazards & Disasters
SLC-Shoreline Change
WCE-Wetlands & Coastal Ecology
PMD-Ports, Marina, and Docks Mgmt
Natural Science Trainings
BIO-Biodiversity Conservation
EMO-Environmental Monitoring
HAB-Harmful Algal Blooms
FFT-Fauna & Flora Taxonomy
INV-Invasive Species
ESS-Ecosystem Services
Climate Focus Trainings
CCA-Climate Adaptation
CCM-Climate Mitigation
CCS-Climate Science
Planning Trainings
LID-Low Impact Design/ Green Practices
LUP-Land Use & Development Issues
RAR-Risk & Resiliency
SWM-Stormwater Management
WDM-Watershed & Floodplain Management
WQI-Water Quality Issues

Code	Topic	Description
BIO	Biodiversity Conservation	Issues or information related to protecting high diversity areas including reserve design, landscape-level connectivity, and wildlife corridors
CGM	Coastal Geomorphology	Coastal geological features and process
CCA	Climate Adaptation	Technical or management information related to both community and ecological adaptations to climate change
CCM	Climate Mitigation	Technical or management information related to the mitigation of human induced climate impacts (e.g., carbon sequestration)
CCS	Climate Science	Science and monitoring information related to studying the causes or impacts of climate change. Includes ocean acidification, thermal expansion, etc…
COS	Communications Skills	Messaging, conflict management, communicating science, marketing, conflict resolution, etc…
EBM	Ecosystem-based Management	Maintaining or restoring the composition, structure and function of natural and modified ecosystems with the goal of long-term sustainability
ECO	Ecotourism	Businesses and activities that are nature based and/or cultural heritage-based. Includes recreation.
EMO	Environmental Monitoring	Monitoring and modeling of environmental conditions in a resource management or research capacity. This includes weather, biological, water level, chemical parameters.
ESS	Ecosystem Services	Economic, social and environmental information that helps describe and measure the value of ecosystems
FFM	Fisheries & Fisheries Management	Regulated species of fish and other seafood and how they are harvested and managed. Includes aquaculture and mariculture issues.
FFT	Fauna & Flora Taxonomy/ID	Study of animals and plant, their identification and natural history
HAB	Harmful Algal Blooms	Overgrowth of algae that adversely impacts water quality aquatic life and/or human health
HAZ	Coastal Hazards & Disasters	Natural and man-made events (e.g., oil spills, tsunami, hurricane) that cause damage or pose risks to coastal areas. Includes planning for, responding to and recovering from hazards.
INV	Invasive Species	Plants, animals and other organisms that grow rapidly and spread easily; and which displace native species, spread diseases, or prey on other native organisms.
ISS	Instrumentation & Software Skills	Training on specific technologies and software including GIS, GPS, Arc Info, etc…
LDS	Leadership Skills	Leadership, facilitation, meeting mgmt., grants writing, financial management, and capacity building within organizations and programs.
LID	Low Impact Design/Green Practices	Methods and technologies that reduce the use of water, energy and chemicals and/or minimize stormwater impacts. Can include rain gardens, rainwater harvesting, BMPs, green construction, etc…
LUP	Land Use & Development Issues	Long range planning and plans for future land uses over a city, county or region. Local, state and regional planning concerns relating to development practices, zoning trends, ordinances, etc…
MEE	Mineral & Energy Extraction	Exploration, mining and/or pumping minerals and fossil fuels

RAR	Risk and Resiliency	Information and knowledge communities and protected areas use to assess and identify risk or vulnerability and to act to improve their ability to resist and quickly recover from sudden environmental changes.
PRS	Process Skills	Skills that support the planning and implementation of trainings, programs, or projects. This includes collaborative learning, needs assessments, project design, logic models, defining audiences, meeting facilitation, and evaluation
PMD	Ports, Marina, Docks Management	Planning for, design and construction, evaluation and other issues relating to recreational and commercial boating facilities
RSC	Restoration Science	Adaptive management and scientific study of the methods and success of various ecosystem restoration processes and techniques. This includes living shorelines, species specific restoration, fire management, etc…
SLC	Shoreline Change	Coastal land loss due to changing sea levels, falling land levels, erosion or inundation.
SWM	Stormwater Management	How and where stormwater runoff is treated or managed (i.e., BMPs) on the landscape. This includes stormwater that comes from many dispersed sources, and rural or urban areas.
VUI	Visitor Use Issues	How to manage visitors, impacts from public users
WCE	Wetlands & Coastal Ecology	Study of wetland and coastal ecosystems and habitats
WDM	Watershed & Floodplain Management	Predicting impacts and issues on a watershed scale; planning and implementing measures to protect and restore watershed functions and the receiving waterbodies. Includes management of floodplains.
WLD	Wildlife & Wildlife Management	Land management and planning for wildlife reasons; related issues – population, health, hunting, disease, etc…
WQI	Water Quality Issues	The broad range of water quality issues including, septic and sewer management, coastal saltwater intrusion, pollutants within surface and/or ground water; TMDLs, drinking water, sediment management,

APPENDIX 9: EXAMPLE POST-EVENT SURVEY



Event Evaluation

Grand Bay NERR Research Symposium

October 14, 2011

1. How would you best characterize your affiliation? (*Please choose one*)

___ Federal Agency
___ State Agency
___ Regional Agency or Association
___ Business/ Business Association
Type of business _____
___ University/College
___ Concerned Citizen
___ Community Group
___ Non-profit Group
___ City/Town Government
___ *Elected/Appointed*
___ *Staff*
___ County Government
___ *Elected/Appointed*
___ *Staff*
___ Elected State Government
___ Media

2. Participating in this event was a good use of my time:

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Not Applicable
☐	☐	☐	☐	☐	☐

3. How much did the Symposium increase your knowledge of the types of research conducted at the Grand Bay NERR?

A Great Deal	A Lot	Some	A Little	Not At All	Not Applicable
☐	☐	☐	☐	☐	☐

3a. If you chose a 'A Little' or 'Not at All' above, why did you make this choice?
___ I already know a lot about this subject
___ The training was too basic
___ The training was too advanced
___ The training was not effective
___ Other (please specify)

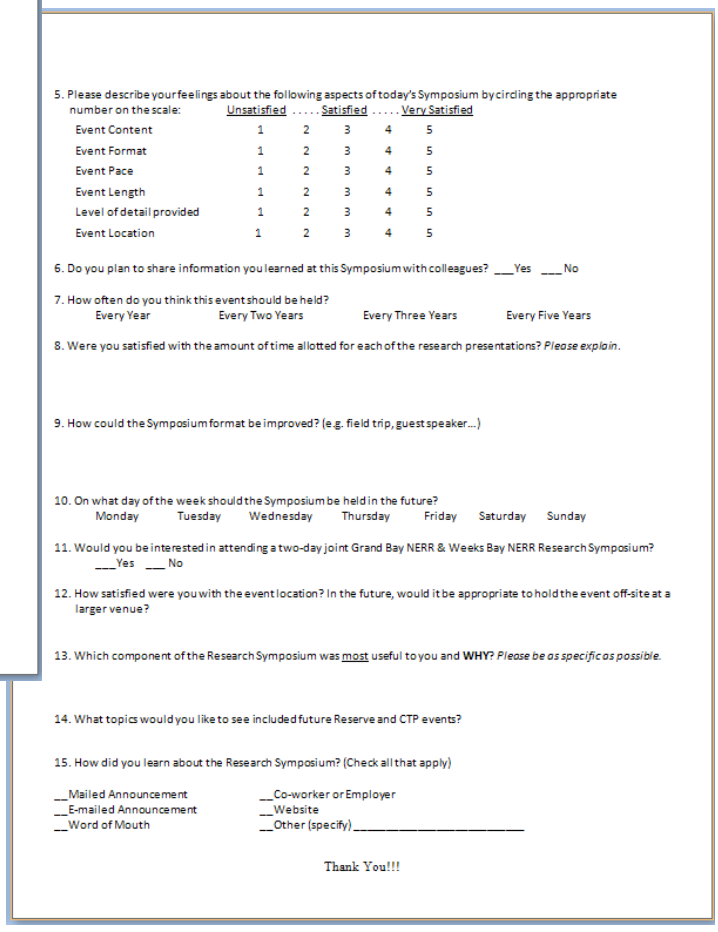
4. Did you learn something new that you will apply in your work or future decisions?
☐ Yes ☐ No ☐ Maybe ☐ Prefer not to answer/Not Applicable

4a. If yes, where would we look in the future to see evidence of that application?

4b. Are there specific obstacles you foresee to applying this information?

4c. What additional training or assistance would help address these obstacles?

(Turn Over to Complete)



5. Please describe your feelings about the following aspects of today's Symposium by circling the appropriate number on the scale: Unsatisfied . . . . . Satisfied . . . . . Very Satisfied

Event Content	1	2	3	4	5
Event Format	1	2	3	4	5
Event Pace	1	2	3	4	5
Event Length	1	2	3	4	5
Level of detail provided	1	2	3	4	5
Event Location	1	2	3	4	5

6. Do you plan to share information you learned at this Symposium with colleagues? ___Yes ___No

7. How often do you think this event should be held?
Every Year Every Two Years Every Three Years Every Five Years

8. Were you satisfied with the amount of time allotted for each of the research presentations? *Please explain.*

9. How could the Symposium format be improved? (e.g. field trip, guest speaker…)

10. On what day of the week should the Symposium be held in the future?
Monday Tuesday Wednesday Thursday Friday Saturday Sunday

11. Would you be interested in attending a two-day joint Grand Bay NERR & Weeks Bay NERR Research Symposium?
___Yes ___ No

12. How satisfied were you with the event location? In the future, would it be appropriate to hold the event off-site at a larger venue?

13. Which component of the Research Symposium was most useful to you and **WHY**? *Please be as specific as possible.*

14. What topics would you like to see included future Reserve and CTP events?

15. How did you learn about the Research Symposium? (Check all that apply)

__Mailed Announcement
__E-mailed Announcement
__Word of Mouth
__Co-worker or Employer
__Website
__Other (specify) _____

Thank You!!!

APPENDIX 10: EXAMPLE OUTCOMES & SUCCESS STORIES

Outcome Statements:

Draft Example 1: Mary Maker, Big Kahuna CTP Coordinator, worked with eight local government officials to implement Low Impact Development Guidelines. To date, six officials have completed plans. As a result, there is more demand in another training program to move to next steps.

Draft Example 2: The Wells NERR CTP partnered with the EBM Tools Network to provide GIS technology skills training to 161 international CDMs through an online seminar on Google Earth and Google Maps. As a result, staff of USAID report intent to use Google Earth for community mapping in the Horn of Africa.

Draft Example 3: The ACE Basin NERR CTP helped develop a facilitation plan to assist Carolina Clear outreach staff in gathering stakeholder input for development of their 5 year strategic plan for targeting non-point source pollution in the Charleston-Berkley-Dorchester county region. Carolina Clear staff also used information gained from a previous training titled 'Fostering Sustainable Behavior' hosted by the ACE Basin, Sapelo Island and NI/WB CTPs.

Success Stories:

Draft Example 1:

1) **CTP Focus Area:** (Watershed & Floodplain Management)WDM

2) **NERRS Priority Issue:** Habitat Protection

3) **Performance Measure:** CDMs use science-based knowledge, skills and resources to support decisions and activities related to NERRS priority issues

4) **Summary Statement:** Participants of Padilla Bay CTP event share information through article to better protect resources by having a trained biologist delineate the high water mark.

5) **Relevance:** For planners in Washington State, determining the ordinary high water mark to guide developers has long been a challenge. State regulations specify a number of development restrictions based on the high water mark, and particularly on small parcels, these regulations can have a major impact on development plans. In addition, different agencies have different definitions for the ordinary high water mark and developers are unsure which definition to use when making their determinations. As a result, planners often submit inaccurate permit application to the state, resulting in delays in the permitting process. Sometimes building are placed too close to the water because of inaccuracies, which results in flooding or property loss through landslides.

6) **Response:** To address this concern, the Padilla Bay CTP developed a two-day workshop on how to determine the ordinary high water mark

following the correct protocol as established by the Department of Ecology. Instructors include wetland specialists and hydrogeologists, and the course includes both classroom and field exercises to learn to use hydrologic, vegetative, soil and geomorphic indicators.

7) **Results:** The program has proven both popular and successful. In surveys, planners report that the training has provided them with a common language and has improved relations with the state regulatory authorities. Permitting agencies have reported that permit applications are more accurate and that planners are more likely to document their findings properly, which helps if findings are challenged in court. Participants also note that the course gives them confidence to discuss the situation with landowners and knowledge of when to call the Department of Ecology for aid. One participant wrote an article using information from the class and distributed it to several thousand people.

Draft Example 2:

1. **CTP Focus Area:** (Land Use and Development Issues)LUP
2. **NERRS Priority Issue:** Habitat Protection
3. **Performance Measure:** Decisions made and actions taken by CDMs reduce negative pressures on coastal ecosystems and NERRS watershed. (Policy, ecological, or enforcement changes address priority ecosystem threats identified by reserve management plans and regional ocean/coastal governance institutions.
4. **Summary Statement:** Efforts by a non-profit, supported by the ACE Basin CTP, result in policy loophole being closed.
5. **Relevance:** The Edisto Island/Edisto Beach community was interested in determining how they could influence local zoning and land use planning to meet the vision of those living in the area. One of the most immediate concerns of the community was a planning policy loophole allowing developers to subdivide 30 acre parcels of land without public comment and without standard development review.
6. **Response:** The ACE Basin NERR CTP coordinator began a process of community visioning and stakeholder engagement and education, which helped address gaps in knowledge and determine how best the community could move forward. Based on interactions with the community, the ACE Basin NERR CTP determined that more detailed information regarding community planning and local land use history was necessary for the stakeholders to influence planning on the island. There was a general misunderstanding regarding how the public can and should interact with decision makers, what could and could not be influenced by stakeholders, and how to go about being part of the planning process influencing the community where these stakeholders lived. A training event taught by NOAA's Coastal Service Center 'Coastal Community Planning and Development' was hosted by the CTP in Edisto to increase the general land use and community planning knowledge of the community members involved in the process. Following the training the CTP continued to facilitate conversation and provide science-based information to help the group make more informed decisions. Through the visioning process, the community determined that the most effective way to meet their needs was to develop an non-profit organization made up of the major groups on the Island and members-at-large. Named the Edisto Island Preservation Alliance (EIPA), this group has taken the skills learned throughout the process and moved forward on a number of efforts.
7. **Results:** Through these efforts, the NERR CTP assisted in creating an engaged, educated public that can now make informed environmental decisions according to their own community goals and vision. Through

Key pad polling (photo credit: Avia Huisman)

facilitating conversation and providing science-based information, the CTP has helped a group of local community leaders understand local land use planning and act on their knowledge. In addition to building consensus within their community, the Edisto Island Preservation Alliance has successfully petitioned the county to remove a zoning loophole that allowed development without a public notice process, helped establish a federal scenic highway through the island, provide community candidate forums prior to elections, and organize the preservation and conservation efforts of one community to affect change and progress toward community defined goals. One unexpected result was that regular interaction with EIPA through the CTP has increased community support for the reserve, as well as the state partner, DNR, and NOAA.

APPENDIX 11: HOW TO USE THE PERFORMANCE MANAGEMENT DATABASE

Getting Started - Note that the Performance Monitoring Database is part of the NOAA's OCRM/CSC. CTP coordinators will be granted access the areas of the database associated with the NERRS Coastal Training Program or other areas at the reserve manager's discretion.

Common Icons found throughout the database:

*Required fields are noted with a red asterisk.

Embedded instructions are found where you see the information icon.

Book of dropdown options to choose from.

How do I Login to the Database?

You will be assigned a username and password based on your reserve and your role at the reserve. Your username and password will allow you to access your own CTP performance data and various analysis and reporting functions. Please contact the National CTP Coordinator at NOAA for your username and password.

Entering the PM Database

Using your internet browser, open a link to the system login (Figure 1): https://www8.nos.noaa.gov/ERDPM/Login.aspx

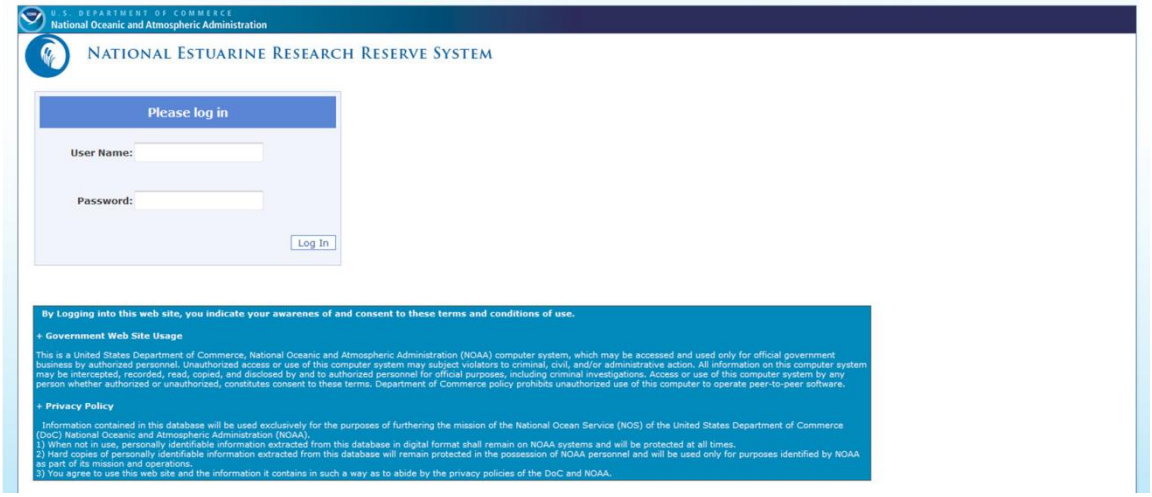

U.S. DEPARTMENT OF COMMERCE
National Oceanic and Atmospheric Administration
NATIONAL ESTUARINE RESEARCH RESERVE SYSTEM
Please log in
User Name:
Password:
Log In
By Logging into this web site, you indicate your awarenes of and consent to these terms and conditions of use.
+ Government Web Site Usage
This is a United States Department of Commerce, National Oceanic and Atmospheric Administration (NOAA) computer system, which may be accessed and used only for official government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action. All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Access or use of this computer system by any person whether authorized or unauthorized, constitutes consent to these terms. Department of Commerce policy prohibits unauthorized use of this computer to operate peer-to-peer software.
+ Privacy Policy
Information contained in this database will be used exclusively for the purposes of furthering the mission of the National Ocean Service (NOS) of the United States Department of Commerce (DoC) National Oceanic and Atmospheric Administration (NOAA).
1) When not in use, personally identifiable information extracted from this database in digital format shall remain on NOAA systems and will be protected at all times.
2) Hard copies of personally identifiable information extracted from this database will remain protected in the possession of NOAA personnel and will be used only for purposes identified by NOAA as part of its mission and operations.
3) You agree to use this web site and the information it contains in such a way as to abide by the privacy policies of the DoC and NOAA.

Figure 1: System Login

After entering your username and password a default screen will appear that includes a list of previously entered training activities and their status (Figures 2 and 3).

Figure 2: Default CTP Data Entry Screen

At the top of the screen are tabs titled Reserve and Reports.
Reports tab - supports the data analysis and reporting functions of the system. These screens include:

- Performance Measures National
- Performance Measures

Reserve tab - links to the different CTP performance data entry screens. These screens include:

- CTP Training Activities
- CTP Technical Assistance
- CTP Outcomes

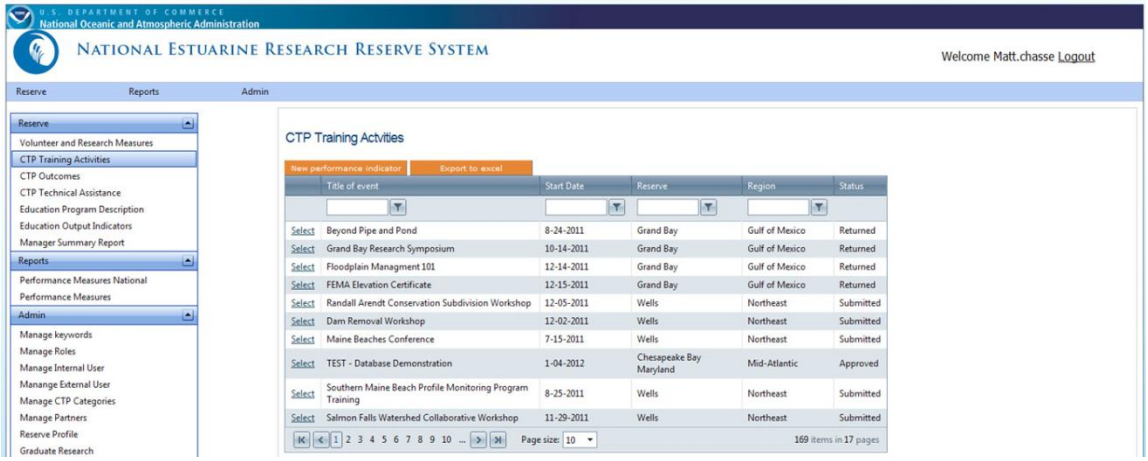
Reserve Tab – Content & Features

This screen (Figure 3.) shows a table of the Reserve's previously entered training activities. Coordinators have the option to view each event by clicking "Select" on the left side of the table. A status column on the right side of the table indicates the entry status of a recorded training event. The types of status are as follows:

- **Draft** – A reserve has input some data from an event but has not completed data entry.
- **Submitted** – A reserve has input data from an event and submitted it to OCRM/CSC for review.
- **Approved** – OCRM/CSC has reviewed the event data and found the submission complete.
- **Returned** – OCRM/CSC has reviewed the event data and returned it to the reserve for revisions.

Additionally, coordinators can click on the orange button "new performance indicator" to enter a new training activity into the system.

Figure 3: CTP Training Activities Table



How can I find a specific event? Using the Filter Function - At the top of the table are filters that allow you to search a Reserve's training events. Mouse over the filter symbol to view and choose among the various filter functions available. (Review OCRM guidance on using the filter functions). Using the Sorting Function – At the top of the table, you'll find the column headings. You may sort the list by clicking over a heading of your choosing.

Adding a new event to the system? To directly input performance measures related to a new training event, click the orange tab "New Performance Indicator". This choice will take you to the "Training Activities" data entry page shown in Figure 2. You will need to fill out a generic information header for each activity that includes the reporting year and the reporting period.

> **Caution**: Be sure to fill out the correct reporting year based on the federal fiscal year (i.e., FY15 starts July 1, 2015 or later). If you do not know what fiscal year the activity occurred in, look at the current fiscal year chart for reserves. It can be found next to the current fiscal year chart for reserves.

> **Note**: If a performance measure data form has already been created for the selected year and timeline, the system will prohibit the action and the "New Performance Indicator" button will be disabled. However, a Reserve can ask the National CTP coordinator to "Return" the submission for revision. This action will allow the Reserve to revise the fiscal year. See below for descriptions of each structural component.

Downloading Reserve CTP Data? Next to the orange tab "New Performance Indicator" is a second orange "Export to Excel" tab. This choice will allow you to export all your selected performance data to an excel spreadsheet.

Note: The excel download function works for each data page (CTP Training Activities, CTP Outcomes, and CTP Training Activities) separately.

CTP Training – Training Activities Data Entry – Training Activities Tab

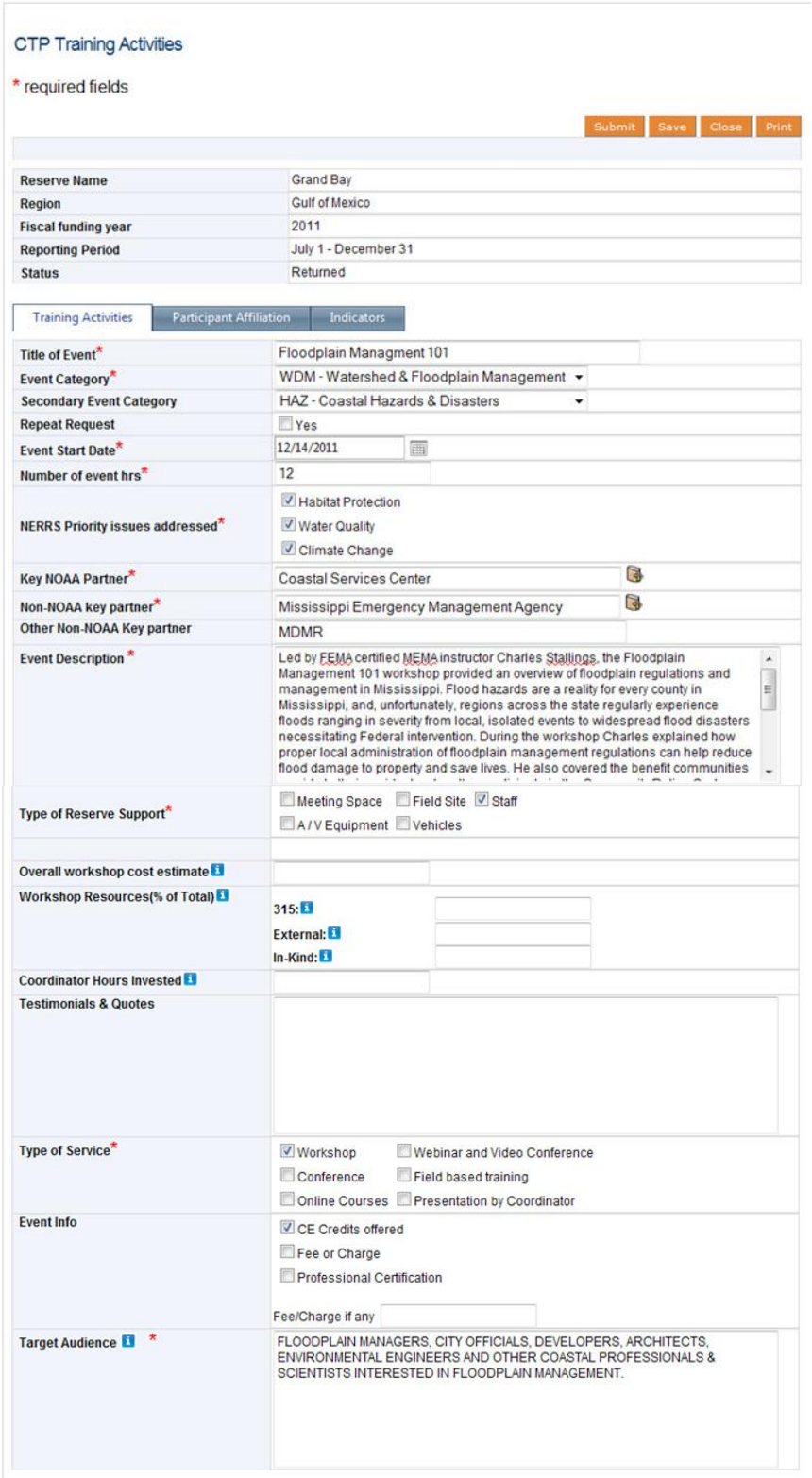
The three tabs depicted under Training Activities link the various data entry pages for a training event. Those are *Training Activities*, *Participant Affiliation* and *Indicators*. More information about each of these tabs is found in the following sections.

The CTP *Training Activities* tab enables coordinators to enter in basic information about a training activity (Figure 4). The following list provides basic instructions for filling out this data entry form. After selecting values for each field on this page, click on the "Save" button.

Title of Event – A free text field for entering the title of the training event.

Event Category – Select a value from drop down menu that denotes the different issue topics relevant under the event. CTP Coordinators have the option to enter a secondary event topic in addition to the required primary event topic. To help you choose the most appropriate topic, placing your cursor over a topic allows a description of that topic to appear. These topics are generally grouped under broad training topics (i.e., resource management, climate change, coastal, planning, natural science, and skills) as shown in Figure 5. Note: Appendix 8 provides detailed descriptions of the topics listed.

Figure 4: Training Activities data entry page.



Repeat Request – A check box that indicates if the event was a repeat of a past training event.

Event Start Date – Using the embedded calendar icon, choose the start date of the event.

Number of event hrs –A free text field of the total event time. Numeric values only.

NERRS priority issue addressed - Select the NERRS priority issue(s) that apply to the activity. The 2011 values shown include: Habitat Protection, Water Quality, Climate Change. Note: Values in the list are controlled by database administrators at NOAA.

Key NOAA Partner – Select a key NOAA partner from drop down. If there is no Key NOAA partner you have to choose the "not applicable" value. Note: Values in the list are controlled by database administrators at NOAA.

Non-NOAA Key Partner- Select a key Non-NOAA partner from drop down. If you cannot find a partner on the list, first choose the "not applicable" value and then add the partner on the "Other Non-NOAA Key Partner field". Values in the drop down list will be periodically updated by database administrators after consultation with the CTP community.

Other Non-NOAA Key Partner – This free text field will enable the entry of other key partners. Note: If you have more than three partners you need to recognize in the database, consider adding them to the event description field.

Event Description - Free text field to add a basic description of an event that details the training. Reserves can use information from their event agenda's and marketing materials to support the description.

Funding Fields – These fields were originally included as part of a FY11 – 13 pilot to track overall workshop investments. The findings of this pilot effort are captured in Appendix 15. Note that Coordinators will not need to report funding data again until 2018.

Type of Reserve support - Check the appropriate box for all the areas of direct support that apply to the event. Note: This does not include your time investment as a CTP coordinator.

Testimonials & Quotes – List any quotes or testimonials provided by participants about the event. This information will be used in future communications applications by the program at the local and national level.

Type of Service - Check appropriate box for all training formats that apply to the event.

Event Info – Check all boxes that can be applied to this event. If a workshop fee was applied to training participants, please list. Note: A specific check box for the American Planning Association certified events is included.

Target Audience – Describe the target audience(s) the event is designed to reach.

SPECIAL ISSUE: Double Reporting

This issue has come up many times as reserves have been increasing collaborating on training events. Until there is a technical fix to the performance database, coordinators should use the following protocol:

Until a permanent solution is implemented for shared training events, coordinators should adhere to the following interim solution. If event is hosted by a specific Reserve, host Reserve records all of the performance monitoring data and lists the other reserves as partners. The partnering reserves can list this event under as "Technical Assistance". 2- If event is not hosted by a specific Reserve or is held at a neutral site, all participating reserves enter the information under the "Training Activities" and "Participant Affiliation" tabs but only the agreed upon reserve records the "Indicators" data. The other partnering reserves should make a note under the "Event Description" on the "Training Activities" tab as to who has entered the "Indicators" data. In the near future when the database is revised, a permanent solution will be in place.

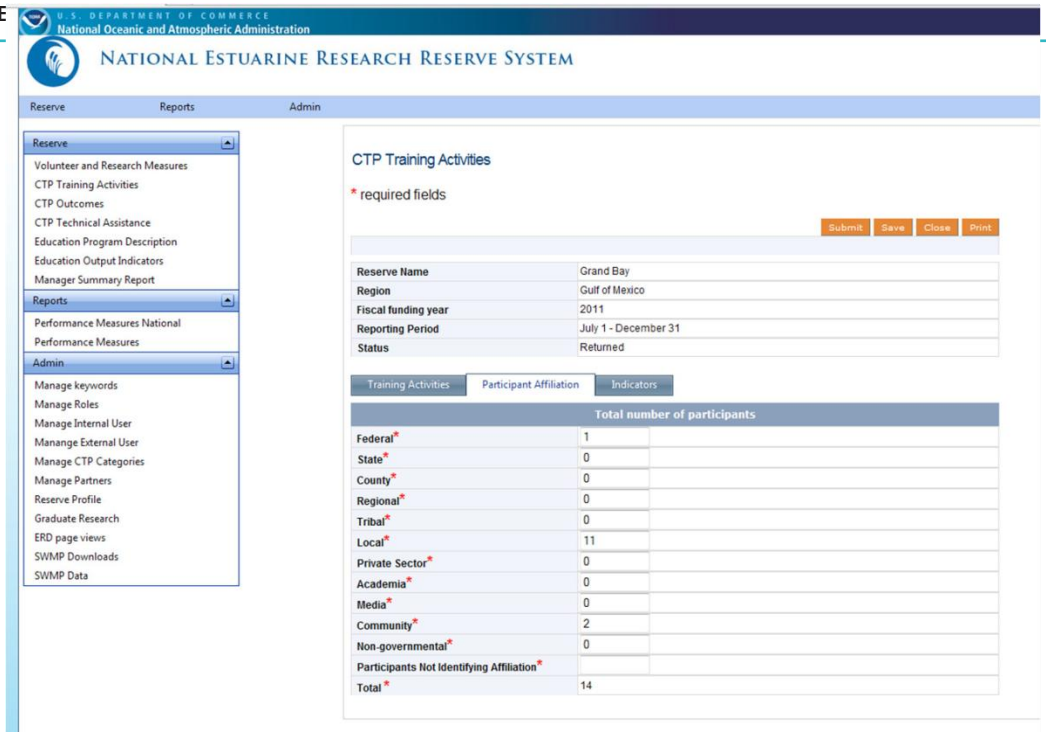
CTP Training Activities Data Entry Page – Participant Affiliation Tab

After entering the basic training event data, click the Participant Affiliation Tab. This will take the coordinator to a data entry page to input the numbers of participants for each affiliation category. The participant affiliation categories listed are identical to the pre-2012 reporting spreadsheet. After selecting values for each field on this page, click on the "Save" button. A running total of the number of participants is recorded at the bottom of the page

Note: Each affiliation category must contain a value. If there are no participants for a category, the value must be entered as zero.

Figure 6: Participant affiliation data entry page.

Figure 5. Broad topical categories.



Note: The row "Participants Not Identifying Affiliation" enables the coordinator to record an accurate count of training activity participants. This is usually captured by either looking at post event evaluations or by looking at the official event sign-in sheet to capture those that did not fill out an evaluation.

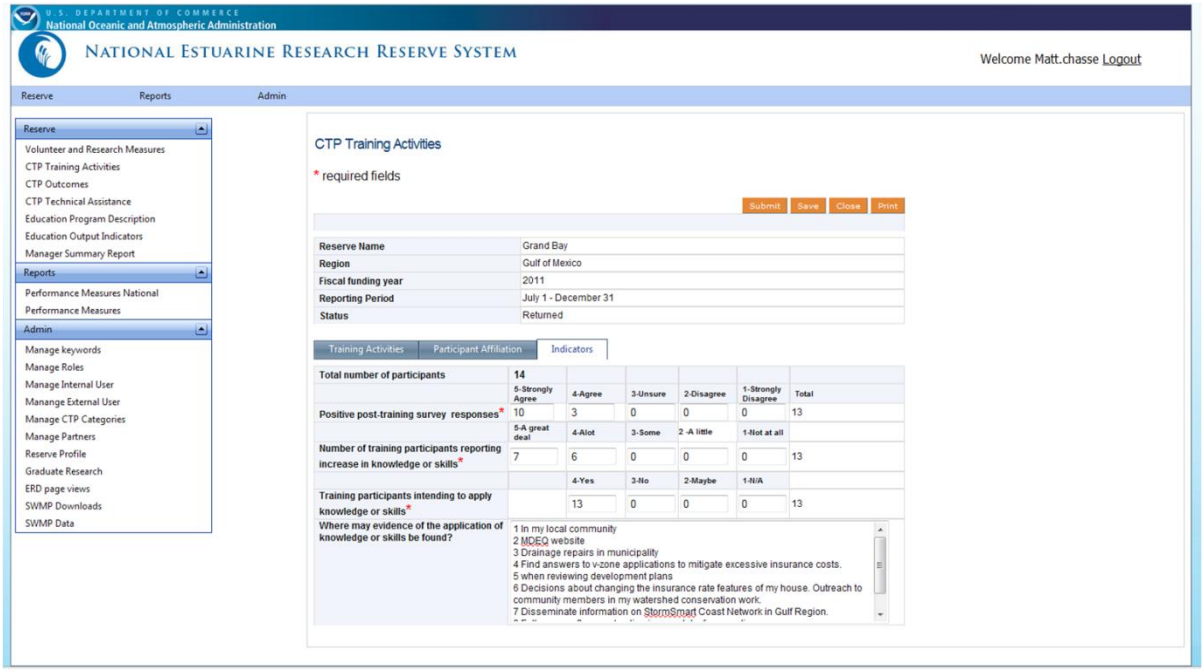
CTP Training Activities Data Entry Page – Indicators Tab

After entering the participant affiliation data, click the *Indicators* Tab. This will take the Coordinator to a data entry page to input the data results for the short and mid-term performance indicators derived from post-event evaluation data.

The indicators data entry page (Figure 7) allows Coordinators to enter performance indicator data obtained from post-event evaluations. Information about the survey questions for each corresponding performance indicator is imbedded within the data entry page. Running totals are provided to the right of each measure and the total number of training participants identified on the participant affiliation tab is listed at the top. These totals provide a quick check enabling the coordinator to ensure that evaluation respondents do not exceed the total number of training participants.

In addition, there is a text field that provides coordinators with an opportunity to identify places were evidence of application may be found in the future. Coordinators can use this information to quickly check for outcomes and success stories that directly or indirectly resulted from a training activity. After selecting values for each field on this page, click on the "Save" button.

Figure 7: Performance Measures data entry page

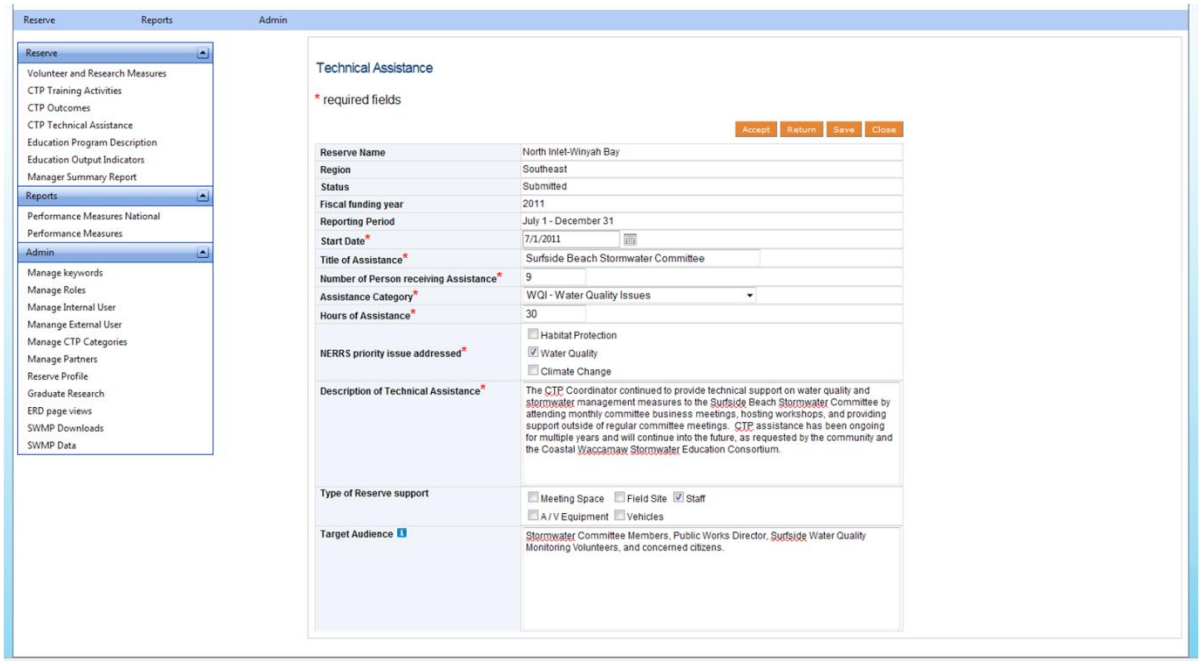


What do I do after I input all my event data? At the top of the different data entry pages you have the option to "Submit" your data to OCRM/CSC for review. If you have completed your data entry to your satisfaction, click on the "Submit" button to send your data to OCRM/CSC. Once you submit, you will not be able to change the data unless OCRM/CSC returns your data for revision.

CTP Technical Assistance Tab

This part of the database enables a Coordinator to enter CTP technical assistance information into the system. Note: Technical assistance only refers to the activities outlined in the approved definition (See Appendix 4). It does not capture all the things that CTP Coordinators do for the program. Figure 8 below depicts the technical assistance data entry page. From this page the Coordinator has the option to enter relevant technical assistance. Many of the fields are identical to the "CTP Training Activities" page including:

Figure 8: Technical Assistance data entry page



Title of Assistance – A free text field to enter a concise title of the technical assistance provided. (Modeled on Title of Event)

Number of persons receiving assistance – Capture the number of persons receiving technical assistance.

Assistance Category – Select value from drop down menus that denotes the primary topic of the technical assistance. (Modeled on event topic category)

Start Date – Using the calendar icon, choose the date the distinct technical assistance began.
Hours of Assistance –A free text field of the total time used to complete the technical assistance. Numeric values only. (Modeled on event hours description).

NERRS priority issue addressed - Select the NERRS priority issues that apply. The 2011 priority issue list includes: Habitat Protection, Water Quality, and Climate Change.

Description of Technical Assistance - Free text field to add a basic description of the assistance provided. (Modeled on the event description).

Type of Reserve support - Check the appropriate box for all the areas of direct support that apply to the event. Note: This does not include your time investment as a CTP coordinator.

Target Audience – Describe the target audience the technical assistance.

After selecting values for each field on this page, click on the "Save" button.

What do I do after I input all my technical assistance information? At the top of the data entry page you have the option to "Submit" your data to OCRM/CSC for review. If you have completed your
data entry to your satisfaction, click on the "Submit" button to send your data to OCRM/CSC Once you submit, you will not be able to change the data unless OCRM/CSC returns your data for revision.

Note: Entering technical assistance is optional; however, if you do enter technical assistance, you are required to enter data in all fields on this page.

Why capture technical assistance? Coordinators can use this information to show links and contributions to future outcomes and success stories. Technical assistance is especially important to look at when partnering with other reserve CTPs on a specific event.

CTP Outcome Statements & Success Stories Tab

This part of the database enables a coordinator to enter CTP outcomes and success stories into the system. Outcomes enable a reserve to capture qualitative results of CTPs impact within the coastal zone. Review the section on Outcome Statements and Success Stories on Pages 14-15 of the manual for more specific information on how to capture this important information.

> **Note:** outcomes could happen anytime after a training event or technical assistance has occurred. As a result, the database enables outcomes to be input separately from training activity or technical assistance information.

The first data screen within the Outcome Statements & Success Stories tab, as depicted in Figure 9, provides a table of previously recorded Reserve CTP outcomes and successes. Coordinators have the option to view each event by clicking "Select" on the left side of the table. A status column on the right side of the table indicates the entry status of a recorded outcome. The types of status are as follows:

- Draft – A reserve has input outcome data but can still edit the information contained within the record.
- Submitted – A reserve has input outcome data and submitted it to OCRM/CSC for review. At this point, no reserve level changes can be made to the record.
- Approved – OCRM/CSC has reviewed the outcome data and found the submission complete.

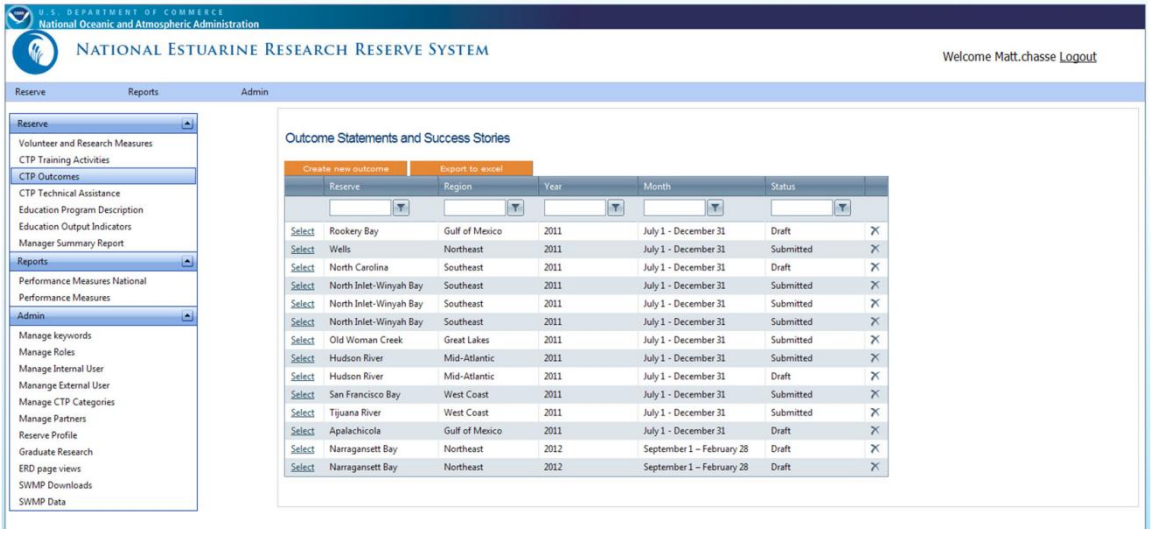
- Returned – OCRM/CSC has reviewed the outcome data and returned the submission for revisions.

How can I find a specific outcome? At the top of the table are filters that allow you to search a Reserve's previously input outcomes. Mouse over the filter symbol to view and choose among the various filter functions available.

Adding a new outcome to the system? To directly input qualitative information related to a new outcome, click the orange tab "Create new outcome". This choice will take you to the "CTP Outcomes and Success Stories" data entry page.

Note: If an outcome/success story record has already been created and approved for the selected year and timeline, the system will prohibit the further action and the "Create new outcome" button will be disabled.

Figure 9: CTP Outcomes and Success Stories view page.



Outcome Statement & Success Story data entry page

This data entry page allows the Reserve CTP coordinator to input the outcomes and success stories into the database. The structure of the outcome statement and success story data entry page is depicted in Figure 10. The page is broken down into several components:

1. **Header box** – denotes three items including the Reserve generating the outcome, what region the reserve is in and the status of the document. Also, the year and month the outcome or success story occurred can be changed within this page.
2. **CTP logic model linkages** – provides the coordinator with the opportunity to link the outcome or success story to Mid-Term Outcome 1 and/or Long-Term Outcome 2. Simple Yes/No check boxes tied to questions directly associated to the logic model outcomes are provided. Note that these outcomes were previously discussed in the manual section on "Reporting Requirements".
3. **Outcome statement and success story details** – The coordinator must identify if the captured result is an outcome and/or success story using the check boxes provided. Text fields are provided for a title and for the different pieces (summary sentence, relevance, response and results) that describe the outcome or success story in detail. Additional information on these

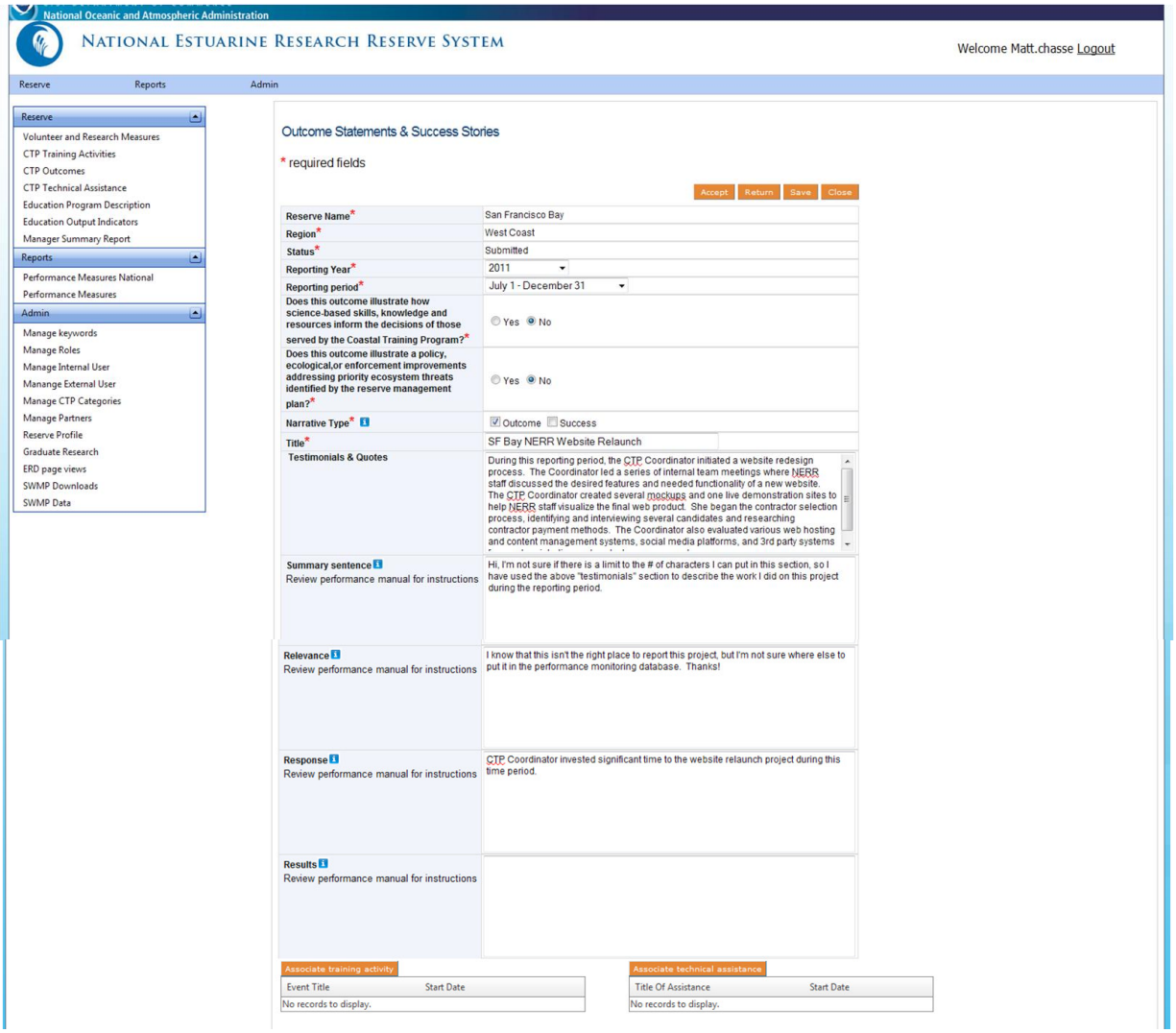
components are found on Pages 14-15 of the manual.

Outcomes: Coordinators are required to fill out in detail the following text box fields: Summary Sentence and Results. The Relevance and Response fields are optional but encouraged.

Success Stories: Coordinators are required to fill out all the text box fields in detail.

In addition, at the bottom of the page, there is the option to associate a past training activity or technical assistance to this outcome/success story. One or more can be associated by selected activities and assistance from a popup window.

Figure 10. Outcome and Success Story data entry page



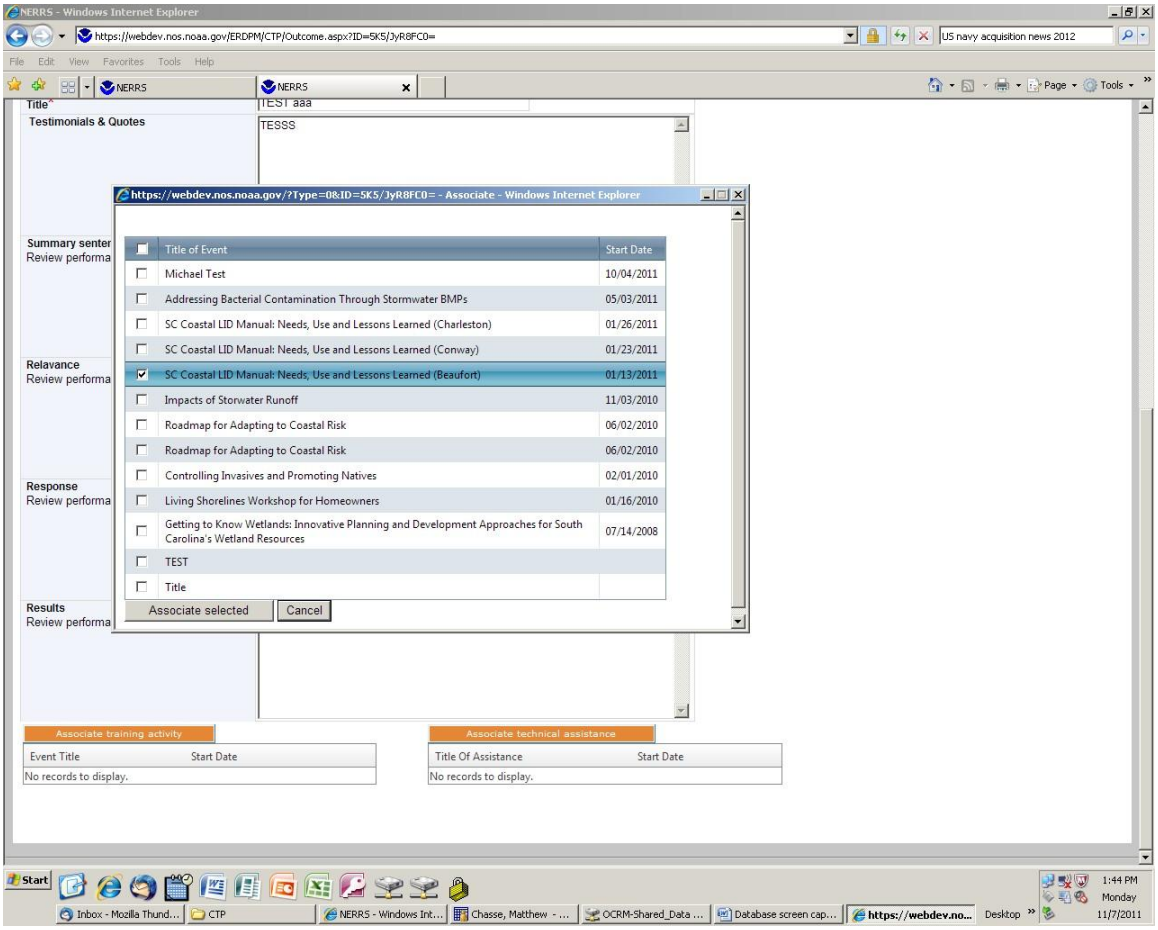
After selecting values for each field on this page, click on the "Save" button. In addition, there is a unique feature of the database that allows the direct linkage between outcome statements and

success stories and previous program activities.

Linking Outcomes & Successes to previous program activities

At the bottom of the data entry page, you can associate a past training activity or technical assistance to this outcome/success story. One or more can be associated by selected activities and assistance from a popup window. Figure 11 depicts how you associate your previous activities to outcomes and successes.

Figure 11. Linking to activities



Note: Previously submitted events or assistance must be approved by OCRM/CSC before becoming available for association with outcomes or success stories.

What do I do after I input an outcome?

At the top of the outcome statement page, you have the option to "Submit" your data to OCRM/CSC for review. If you have completed your data entry to your satisfaction, click on the "Submit" button to send your data to OCRM/CSC. Once you submit, you will not be able to change the data unless OCRM/CSC returns your data for revision.

APPENDIX 12: CTP MONITORING DATABASE REPORTING & SYNTHESIS

Getting Started

The Performance Monitoring Database is part of NOAA's OCRM/CSC. CTP Coordinators will be granted access to the areas of the database associated with the NERRS Coastal Training Program or other areas at the reserve manager's discretion.

Common Icons found throughout the database:

* Required fields are noted with a red asterisk.

Information Icon contains embedded instructions

How do I Login to the Database?

You will be assigned a username and password based on your reserve and your role at the reserve. Your username and password will allow you to access your own CTP performance data and various analysis and reporting functions. Please contact Michael Migliori Michael.Migliori@noaa.gov for your username and password.

Entering the PM Database

Using your internet browser, open a link to the system login (Figure 1): https://webdev.nos.noaa.gov/ERDPM/Login.aspx (Note: final link will be added after the database is approved by NOAA IT)

Creating reports & data synthesis

At the top of the screen are tabs titled Reserve and Reports. Focusing on the performance data reporting functions, the Reports tab enables reserves to review various syntheses of their performance data. The reports tab will include two data synthesis options:

- Performance Measures National
- Performance Measures

Performance Measures National Tab

This tab provides an annual system-wide synthesis of selected performance indicator data. As depicted in Figure 1, one or more of the current NERRS performance indicators can be selected using check boxes. For those indicators selected, the database will produce a report either as a Word or pdf document that shows the system-wide summary of performance results. An example of a report is shown in Figure 2.

Performance Measures Tab

This tab provides an annual synthesis of selected performance indicator data from one or more reserves. One or more of the current NERRS performance indicators can be selected using check boxes, as well as one or more reserves. For those indicators selected, the database will produce a report either as a Word or pdf document that shows a summary of performance results for a reserve or subset of reserves. This tab could be used to provide regional performance data summaries as needed for a reserve.

In the future, the OCRM will create additional data queries, synthesis and reporting options to make full use of the complete suite of data submitted as part of the performance monitoring database.

Figure 1. National Indicators reporting page

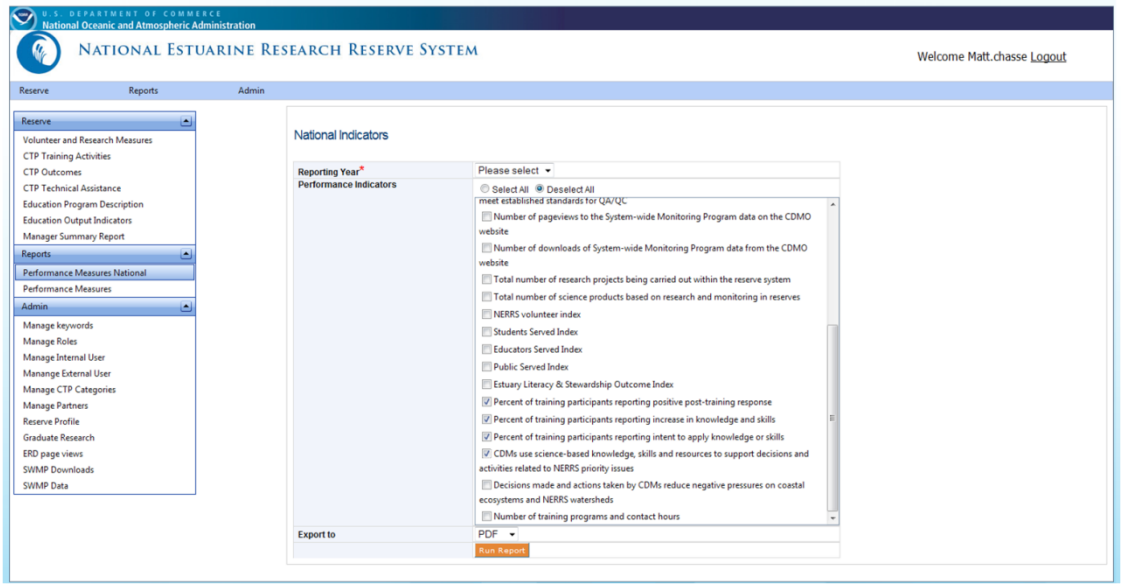
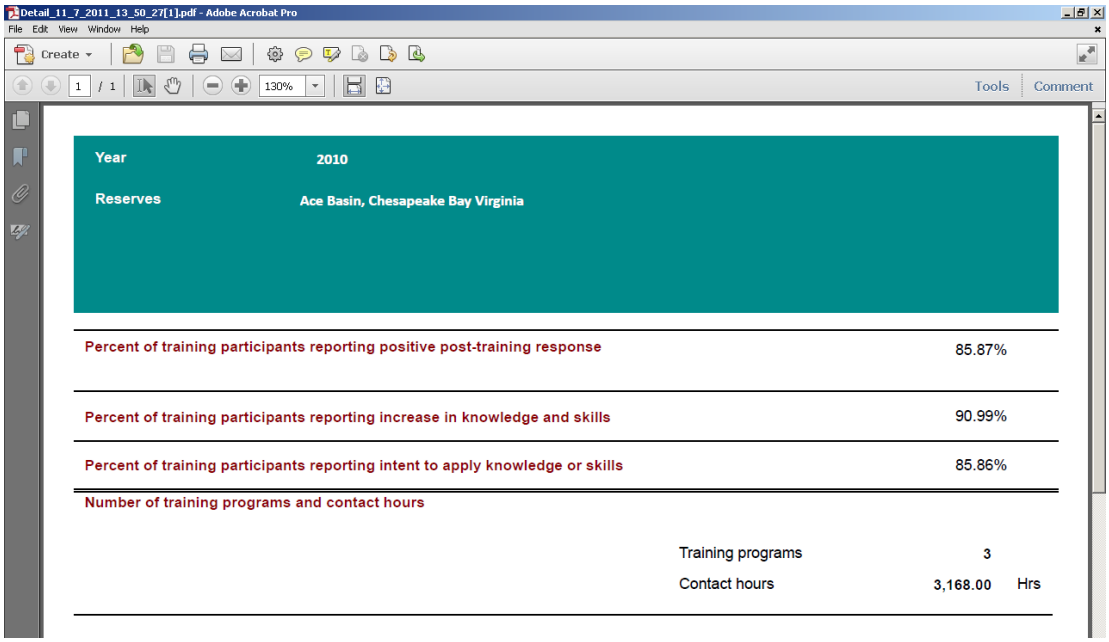
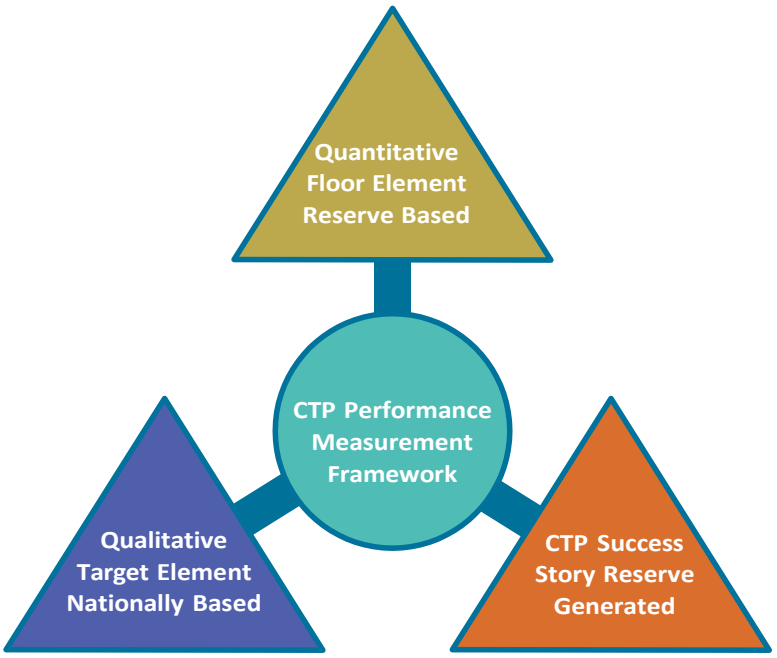


Figure 2. Example performance report



APPENDIX 13: PERFORMANCE STANDARDS

Overall Concept - Tri-Element Model
Using a tri-element model, the standards include quantitative, qualitative and success-oriented elements. Each is based on an existing performance indicator.



Part I – Quantitative Floor Element – "Capacity Based Floors"

- Maintain capacity to deliver at least 5 CDM training events annually for each approved CTP

Original Concept: *Create reserve minimum for one or more quantitative indicators. Forms an objective basis for expectations (NOAA accountability)*

Part II – Qualitative Element 2 – "National CTP Target"

- 90% of the CDMs participating in CTP training or services report they plan to apply what they learned in their work or decisions.

Original Concept: *Create a national target for the overall program. Forms an objective basis for expectations (NOAA accountability)*

Part III –Qualitative Element 3 – "Reserve Generated Success Story"

Original Concept: Identify individual reserve CTP success story linked to mid to long-term outcomes. Annually, reserve CTPs capture one or more success stories for their program. Each story is captured within the Performance Monitoring Database and is linked to one of CTPs mid to long-term outcomes identified on the National CTP logic model.

- Reserve CTP will annually submit at least one success story linked to CTP outcomes.

Original Concept: *Identify individual reserve CTP success story linked to mid to long-term outcomes. Annually, reserve CTPs capture one or more success stories for their program. Each story is captured within the Performance Monitoring Database and is linked to one of CTPs mid to long-term outcomes identified on the National CTP logic model.*

APPENDIX 14: NOAA AND OCRM/CSC PERFORMANCE MEASURES AND INDICATORS

FY2011 List of Performance Measures	
OCRM/CSC; CDMO-Centralized Data Management Office; R-Reserves (includes CTP)	
Percent of biogeographic regions represented within the NERRS	OCRM1
Number and percent of reserves with complete site profiles	OCRM2
Number and percent of reserves with an up-to-date management plan	OCRM3
Total number of acres acquired or designated for protection	OCRM4
Number of acres acquired consistent with land acquisition and management plans	OCRM5
Number of Graduate Research Fellow applicants per opening	OCRM6
Number of Graduate Research Fellow applicants starting in the program	OCRM7
Number of Graduate Research Fellow applicants completing a graduate thesis program that focuses of the NERR priority areas for research	OCRM8
Page-views on nerrs.noaa.gov and estuaries.gov education sites	OCRM9
Percent of NERR sites that submit 85% or greater of the available SWMP data sets that meet established standards for QA/QC	CDMO1
• water quality data	
• weather data	
• nutrient data	
Number of pageviews to the System-wide Monitoring Program data on the CDMO website	CDMO2
Number of downloads of System-wide Monitoring Program data from the CDMO website	CDMO3
Total number of research projects being carried out within the reserve system	R1
Total number of science products based on research and monitoring in reserves	R2
NERRS volunteer index	R20
Volunteer Hours	
• education	
• research and monitoring	
• administration	

• other	
Volunteers	
• education	
Student Education Index	R21
• students reached	
• contact hours	
Educator Training Index	R22
• educators trained	
• contact hours	
Number of walk-in visitors at NERRS education/visitor center	R23 (Pilot FY2011)
Education Outcome Statements	R24 (Pilot FY2011)
Percent of training participants reporting positive post-training response	CTP Short Term Outcome 1
Percent of training participants reporting increase in knowledge and skills	CTP Short Term Outcome 3
Percent of training participants reporting intent to apply knowledge or skills	CTP M1 Bridge
CDMs use science-based knowledge, skills and resources to support decisions and activities related to NERRS priority issues	CTP Mid Term Outcome 1
Decisions made and actions taken by CDMs reduce negative pressures on coastal ecosystems and NERRS watersheds	CTP Long Term Outcome 2
Number of training programs and contact hours	CTP Output 1

APPENDIX 15: TRACKING INVESTMENTS IN THE COASTAL TRAINING PROGRAM

NOTE: In fall 2013, after a pilot to was conducted to track overall workshop investment in dollars and source of the invested resources, a funding task force* recommended that funding data not be collected. Subsequently, NOAA Leadership was consulted and it was concluded that funding data will only be collected every five years: 2018, 2023, 2028 etc. It is recommended that in 2017, the Performance Monitoring Workgroup convene a funding task force to determine the type of funding data to collect for the single year of 2018. The content of Appendix 15 is retained for posterity.
* Matt Chasse, Emilie Hauser, Steve Miller, Whitney Jenkins, Heather Elmer and Kelly Valencik

POLICY RECOMMENDATION BY THE PERFORMANCE MONITORING WORKGROUP FUNDING TASKFORCE

AUGUST 25, 2011

I. Recommendation

The NERRS Coastal Training Program pilots an effort to track overall workshop investment in dollars and source of the invested resources. Information collected will be used internally by ERD and coordinators to gauge program efficiencies.

II. Background

NOAA and OCRM/CSC use National Estuarine Research Reserve System (NERRS) performance measures to evaluate the effectiveness of the system in making progress towards achieving the goals of the Coastal Zone Management Act of 1972, as amended. The information collected is reported to Congress and the Office of Budget & Management (OMB) to assess the efficiency of programs under the CZMA. In this instance, efficiency can be thought of as the impact for the dollars invested.

III. Tracking CTP Investment

To support national efforts to measure and evaluate program efficiencies, the NERRS Coastal Training

Program will pilot an effort to track overall workshop investment in dollars and source of the invested resources. The data collected could provide data that supports analysis of the CTP's impact for the Federal dollars invested. Tracking of CTP investment is considered a pilot effort in FY11-12 and the information collected will be used internally by ERD and the Performance Monitoring Workgroup to gauge program efficiencies. At the end of FY12, the pilot will be evaluated for its success in capturing investment in CTP and to determine if the value of results justifies the time and effort required to collect this information.

The information collected is defined in section III and entered into the NERRS performance monitoring database. Additionally, due to the diversity of coordinator salaries across the nation, CTP coordinators will be asked to capture their best estimate of time invested in individual workshops.

IV. Data Collection

Workshop budget information will be collected by the coordinator and input into the NERRS performance database under Training Activities. To help the coordinator capture/track workshop costs, a suggested generic budgeting worksheet is

provided (Appendix A). Information added to the performance database includes:

i. Total Estimate Workshop cost (in dollars)

ii. 315 Funds (percentage of total)

iii. External Funding (percentage of total)

iv. In Kind Resources (percentage of total)

v. Estimated coordinator

hours Example database view:

Overall workshop cost estimate **$2,100**

Workshop Resources (% of Total)

315 **10** External **50** In-Kind **40**

Coordinator Hours Invested **36**

Disclaimer – Coordinator hours are included in the workshop cost estimate. ERD may use 315 grant award or a national mean estimate to calculate the value of coordinator time into program efficiency queries.

V. Terminology

a. In Kind Services - Services or goods that the CTP did not pay money for, were donated or provided by a partner. It is important to track this information to uncover the true cost of CTP events. Can include:

i. Meeting room

ii. Food

iii. Speaker time for event preparation and presentation

iv. Supplies (meeting notebooks, flip charts, nametags, etc.)

v. Vehicle use (for field trips, etc.)

vi. Staff (non-315 grant funded or partner) for planning content

vii. Staff (non-315 grant funded or partner) for planning logistics

viii. Staff (non-315 grant funded or partner) for executing events

ix. Other

b. External Funds - Funding other that Reserve's 315 grant. External funds can include the following sources:

i. Grants

ii. Program fees (captured in database under "event info")

iii. Vendor fees

iv. Partner cash contribution

v. Corporate Donation

vi. Friends Group

vii. Other

c. Reserve's 315 Funds - Funding provided by the Reserve's operational grant, (i.e., $90K target for CTP).

Definition Note: Both external and 315 funds can pay for:

- Venue or meeting room rental
- Food
- Equipment rental (projectors and other AV equipment)
- Speaker honorarium
- Speaker travel for event
- Staff travel for event
- Supplies (meeting notebooks, flip charts, nametags, etc.)
- Vehicle rental (for field trips, etc.)
- Non-coordinator personnel costs

Sample Generic Workshop Budget

Coastal Training Program

Generic Budget for Reporting CTP Funding

Revenue

Operations Grant - 315	$600
External Grant	
Partner contribution	
Vendor fees	
Participant fees	
Other	$600
Total	$1200

				In- Kind	External	315
Expenses - Planning	Unit cost	number	Cost			
Speaker time for prep						
Personnel for planning content	$30	40	$1,200	$600		$600
Personnel for planning logistics			0			
Sub Total			$1,200			
Expenses - Day(s) of event						
Supplies			0			
Rental -vehicle and boat			0			
Rental - venue or room			0			
Rental - Equipment projectors and other AV equipment)			0			
Food			0			
Honorarium for speakers			0			
Personnel day of event			0			
Speaker time			0			
Speaker travel			0			
Contracted services			0			
Other			0			
Sub Total			0			

Expenses - Post- event	Unit cost	number	Cost			
Personnel - evaluation			0			
Personnel - posting documents, accts payable and receivable, thanks yous etc.			0			
Conference proceedings			0			
Sub Total			0			

Contracted services: Facilitator, notetakers, reception, videographer, AV tech, conference proceedings.

Personnel: Only includes Non-CTP coordinator costs

National Estuarine Research Reserve System

www.nerrs.noaa.gov

National Oceanic and Atmospheric Administration
U.S. Department of Commerce